



Euromonitor
International

Home Care in Tunisia

February 2025

Table of Contents

Home Care in Tunisia

EXECUTIVE SUMMARY

- Home care in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retailing developments
- What next for home care?

MARKET INDICATORS

Table 1 - Households 2019-2024

MARKET DATA

- Table 2 - Sales of Home Care by Category: Value 2019-2024
- Table 3 - Sales of Home Care by Category: % Value Growth 2019-2024
- Table 4 - NBO Company Shares of Home Care: % Value 2020-2024
- Table 5 - LBN Brand Shares of Home Care: % Value 2021-2024
- Table 6 - Penetration of Private Label in Home Care by Category: % Value 2019-2024
- Table 7 - Distribution of Home Care by Format: % Value 2019-2024
- Table 8 - Distribution of Home Care by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Home Care by Category: Value 2024-2029
- Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Air Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Volume sales slow due to higher prices
- Liquid air care records the highest growth
- Specialised stores support development of air care

PROSPECTS AND OPPORTUNITIES

- Other air care faces a bright outlook
- Car air care to enjoy solid performance
- Economy lines to perform well in upcoming years

CATEGORY DATA

- Table 11 - Sales of Air Care by Category: Value 2019-2024
- Table 12 - Sales of Air Care by Category: % Value Growth 2019-2024
- Table 13 - NBO Company Shares of Air Care: % Value 2020-2024
- Table 14 - LBN Brand Shares of Air Care: % Value 2021-2024
- Table 15 - Forecast Sales of Air Care by Category: Value 2024-2029
- Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2024-2029

Bleach in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slowdown in bleach sales over 2024
Private label enters the bleach category
Rising demand for bleach in modern grocery retailers and discounters

PROSPECTS AND OPPORTUNITIES

Innovation is expected to focus on non-chlorine bleach
Stagnation in consumer demand due to shift towards specialised cleaning products with bleach
Low- and middle-income groups to remain core bleach buyers

CATEGORY DATA

- Table 17 - Sales of Bleach: Value 2019-2024
- Table 18 - Sales of Bleach: % Value Growth 2019-2024
- Table 19 - NBO Company Shares of Bleach: % Value 2020-2024
- Table 20 - LBN Brand Shares of Bleach: % Value 2021-2024
- Table 21 - Forecast Sales of Bleach: Value 2024-2029
- Table 22 - Forecast Sales of Bleach: % Value Growth 2024-2029

Dishwashing in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Domestic brands spearhead growth in hand dishwashing
Specialised hand dishwashing products emerge in modern grocery retailers
Hand dishwashing is notable for international brands and private label

PROSPECTS AND OPPORTUNITIES

Growing presence of private label is anticipated
Unpackaged hand dishwashing products are main threat
Strong competition between incumbent brands

CATEGORY INDICATORS

- Table 23 - Household Possession of Dishwashers 2019-2024

CATEGORY DATA

- Table 24 - Sales of Dishwashing by Category: Value 2019-2024
- Table 25 - Sales of Dishwashing by Category: % Value Growth 2019-2024
- Table 26 - NBO Company Shares of Dishwashing: % Value 2020-2024
- Table 27 - LBN Brand Shares of Dishwashing: % Value 2021-2024
- Table 28 - Forecast Sales of Dishwashing by Category: Value 2024-2029
- Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2024-2029

Home Insecticides in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lower levels of municipal waste management drives home insecticides sales
Spray/aerosol home insecticides are popular choice
Growing interest in home insecticide baits

PROSPECTS AND OPPORTUNITIES

Manufacturers to focus on developing nature-friendly products with fewer chemicals
Advertising and promotion play an important role within home insecticides
Electric insecticides are the popular choice among families

CATEGORY DATA

- Table 30 - Sales of Home Insecticides by Category: Value 2019-2024
- Table 31 - Sales of Home Insecticides by Category: % Value Growth 2019-2024
- Table 32 - NBO Company Shares of Home Insecticides: % Value 2020-2024
- Table 33 - LBN Brand Shares of Home Insecticides: % Value 2021-2024
- Table 34 - Forecast Sales of Home Insecticides by Category: Value 2024-2029
- Table 35 - Forecast Sales of Home Insecticides by Category: % Value Growth 2024-2029

Laundry Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Resurgence of unpackaged laundry detergents after several years of absence
- Promotional strategies boost sales of laundry products
- Laundry aids remains a niche in laundry care

PROSPECTS AND OPPORTUNITIES

- Bar detergents remain popular in Tunisia
- Hand wash detergents face decline
- Concentrated laundry detergents to enjoy steady growth

CATEGORY INDICATORS

- Table 36 - Household Possession of Washing Machines 2019-2024

CATEGORY DATA

- Table 37 - Sales of Laundry Care by Category: Value 2019-2024
- Table 38 - Sales of Laundry Care by Category: % Value Growth 2019-2024
- Table 39 - Sales of Laundry Aids by Category: Value 2019-2024
- Table 40 - Sales of Laundry Aids by Category: % Value Growth 2019-2024
- Table 41 - Sales of Laundry Detergents by Category: Value 2019-2024
- Table 42 - Sales of Laundry Detergents by Category: % Value Growth 2019-2024
- Table 43 - NBO Company Shares of Laundry Care: % Value 2020-2024
- Table 44 - LBN Brand Shares of Laundry Care: % Value 2021-2024
- Table 45 - NBO Company Shares of Laundry Aids: % Value 2020-2024
- Table 46 - LBN Brand Shares of Laundry Aids: % Value 2021-2024
- Table 47 - NBO Company Shares of Laundry Detergents: % Value 2020-2024
- Table 48 - LBN Brand Shares of Laundry Detergents: % Value 2021-2024
- Table 49 - Forecast Sales of Laundry Care by Category: Value 2024-2029
- Table 50 - Forecast Sales of Laundry Care by Category: % Value Growth 2024-2029

Polishes in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Shoe polish remains the biggest category with an absence of local players
- Furniture polish shows good performance despite the lack of promotion
- Modern grocery retailers lead in distribution

PROSPECTS AND OPPORTUNITIES

- Floor polishes face promising outlook
- Rising average unit prices to support value growth
- Growing interest among international players

CATEGORY DATA

- Table 51 - Sales of Polishes by Category: Value 2019-2024
- Table 52 - Sales of Polishes by Category: % Value Growth 2019-2024
- Table 53 - NBO Company Shares of Polishes: % Value 2020-2024
- Table 54 - LBN Brand Shares of Polishes: % Value 2021-2024
- Table 55 - Forecast Sales of Polishes by Category: Value 2024-2029
- Table 56 - Forecast Sales of Polishes by Category: % Value Growth 2024-2029

Surface Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Young couples support surface care in modern grocery retailers
- Fierce competition between leading brands in surface care
- Lacklustre performance in home care wipes

PROSPECTS AND OPPORTUNITIES

- Bright outlook for surface care
- Niche categories are expected to develop
- Promotional strategies will remain key to future sales growth

CATEGORY DATA

- Table 57 - Sales of Surface Care by Category: Value 2019-2024
- Table 58 - Sales of Surface Care by Category: % Value Growth 2019-2024
- Table 59 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2019-2024
- Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2019-2024
- Table 61 - NBO Company Shares of Surface Care: % Value 2020-2024
- Table 62 - LBN Brand Shares of Surface Care: % Value 2021-2024
- Table 63 - Forecast Sales of Surface Care by Category: Value 2024-2029
- Table 64 - Forecast Sales of Surface Care by Category: % Value Growth 2024-2029

Toilet Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Expansion of toilet care brands in traditional grocery retailers
- Local players ramp up developments as competition intensifies
- Toilet liquid/foam is most popular product

PROSPECTS AND OPPORTUNITIES

- Private label to expand over the forecast period
- Health and hygiene focus will boost toilet care sector
- Multinational brands have a strong presence within toilet care

CATEGORY DATA

- Table 65 - Sales of Toilet Care by Category: Value 2019-2024
- Table 66 - Sales of Toilet Care by Category: % Value Growth 2019-2024
- Table 67 - NBO Company Shares of Toilet Care: % Value 2020-2024
- Table 68 - LBN Brand Shares of Toilet Care: % Value 2021-2024
- Table 69 - Forecast Sales of Toilet Care by Category: Value 2024-2029
- Table 70 - Forecast Sales of Toilet Care by Category: % Value Growth 2024-2029

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/home-care-in-tunisia/report.