



Euromonitor
International

Beauty and Personal Care in Tunisia

July 2025

Table of Contents

EXECUTIVE SUMMARY

- Beauty and personal care in 2024: The big picture
- 2024 key trends
- Competitive landscape
- Retail developments
- What next for beauty and personal care?

MARKET DATA

- Table 1 - Sales of Beauty and Personal Care by Category: Value 2019-2024
- Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2019-2024
- Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2020-2024
- Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2021-2024
- Table 6 - Penetration of Private Label in Beauty and Personal Care by Category: % Value 2019-2024
- Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2019-2024
- Table 8 - Distribution of Beauty and Personal Care by Format and Category: % Value 2024
- Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2024-2029
- Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

Baby and Child-Specific Products in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Smaller families enables parents to up spend
- Baby wipe brands perform strongly
- E-commerce gains most value share

PROSPECTS AND OPPORTUNITIES

- Continuing value and volume growth over forecast period
- Local brands and private label register growth
- Increasing focus on natural ingredients

CATEGORY DATA

- Table 11 - Sales of Baby and Child-specific Products by Category: Value 2019-2024
- Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2019-2024
- Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2019-2024
- Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2020-2024
- Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2021-2024
- Table 16 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2021-2024
- Table 17 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2021-2024
- Table 18 - Forecast Sales of Baby and Child-specific Products by Category: Value 2024-2029
- Table 19 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2024-2029
- Table 20 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2024-2029

Bath and Shower in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Bar soap continues to account for most value sales, due to its affordability
Henkel loses value share as local brands gain
E-commerce emerging as significant distribution channel

PROSPECTS AND OPPORTUNITIES

Continuing value and volume growth over forecast period
Growth in private label, with hand sanitisers also making a comeback
Scent—key focus of differentiation

CATEGORY DATA

Table 21 - Sales of Bath and Shower by Category: Value 2019-2024
Table 22 - Sales of Bath and Shower by Category: % Value Growth 2019-2024
Table 23 - Sales of Bath and Shower by Premium vs Mass: % Value 2019-2024
Table 24 - NBO Company Shares of Bath and Shower: % Value 2020-2024
Table 25 - LBN Brand Shares of Bath and Shower: % Value 2021-2024
Table 26 - LBN Brand Shares of Premium Bath and Shower: % Value 2021-2024
Table 27 - Forecast Sales of Bath and Shower by Category: Value 2024-2029
Table 28 - Forecast Sales of Bath and Shower by Category: % Value Growth 2024-2029
Table 29 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2024-2029

Colour Cosmetics in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Facial make-up accounts for most value sales and also registers highest value growth
Italian brand Kiko Milan gains most value share
Direct selling registers highest value growth

PROSPECTS AND OPPORTUNITIES

Facial make-up continues to drive growth
Illegal trade remains significant
Continuing innovation drives sales

CATEGORY DATA

Table 30 - Sales of Colour Cosmetics by Category: Value 2019-2024
Table 31 - Sales of Colour Cosmetics by Category: % Value Growth 2019-2024
Table 32 - Sales of Colour Cosmetics by Premium vs Mass: % Value 2019-2024
Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2020-2024
Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2021-2024
Table 35 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2021-2024
Table 36 - Forecast Sales of Colour Cosmetics by Category: Value 2024-2029
Table 37 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2024-2029
Table 38 - Forecast Sales of Colour Cosmetics by Premium vs Mass: % Value 2024-2029

Deodorants in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive volume growth in 2024
Satem makes significant gains, due to the affordability of its range
Small local grocers continue to lead distribution

PROSPECTS AND OPPORTUNITIES

Deodorant sticks register highest value growth
Some growth for premium offerings
Focus on clean ingredients and effectiveness

CATEGORY DATA

Table 39 - Sales of Deodorants by Category: Value 2019-2024
Table 40 - Sales of Deodorants by Category: % Value Growth 2019-2024
Table 41 - Sales of Deodorants by Premium vs Mass: % Value 2019-2024
Table 42 - NBO Company Shares of Deodorants: % Value 2020-2024
Table 43 - LBN Brand Shares of Deodorants: % Value 2021-2024
Table 44 - LBN Brand Shares of Premium Deodorants: % Value 2021-2024
Table 45 - Forecast Sales of Deodorants by Category: Value 2024-2029
Table 46 - Forecast Sales of Deodorants by Category: % Value Growth 2024-2029
Table 47 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2024-2029

Depilatories in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Hair removers/bleaches more popular
Local company Nihel continues to lead
Modern grocery retailers gaining value share

PROSPECTS AND OPPORTUNITIES

Rosy outlook over forecast period
Growing demand for hair removers among men
Continuing innovation over forecast period

CATEGORY DATA

Table 48 - Sales of Depilatories by Category: Value 2019-2024
Table 49 - Sales of Depilatories by Category: % Value Growth 2019-2024
Table 50 - NBO Company Shares of Depilatories: % Value 2020-2024
Table 51 - LBN Brand Shares of Depilatories: % Value 2021-2024
Table 52 - Forecast Sales of Depilatories by Category: Value 2024-2029
Table 53 - Forecast Sales of Depilatories by Category: % Value Growth 2024-2029

Fragrances in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Muted volume growth in 2024
Landscape remains highly fragmented
Beauty specialists continue to lead distribution

PROSPECTS AND OPPORTUNITIES

Higher volume growth for mass fragrances
Illegal trade remains significant
Dupes continue to grow in popularity

CATEGORY DATA

Table 54 - Sales of Fragrances by Category: Value 2019-2024

Table 55 - Sales of Fragrances by Category: % Value Growth 2019-2024

Table 56 - NBO Company Shares of Fragrances: % Value 2020-2024

Table 57 - LBN Brand Shares of Fragrances: % Value 2021-2024

Table 58 - LBN Brand Shares of Premium Men's Fragrances: % Value 2021-2024

Table 59 - LBN Brand Shares of Premium Women's Fragrances: % Value 2021-2024

Table 60 - Forecast Sales of Fragrances by Category: Value 2024-2029

Table 61 - Forecast Sales of Fragrances by Category: % Value Growth 2024-2029

Hair Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Conditioners and treatments register highest value growth

SAH's new company, Lilas Cosmetics, already gains significant foothold

Hypermarkets offer large range of local, mass brands

PROSPECTS AND OPPORTUNITIES

Stable growth over forecast period

Illegal trade still an issue

Focus on a more natural positioning

CATEGORY DATA

Table 62 - Sales of Hair Care by Category: Value 2019-2024

Table 63 - Sales of Hair Care by Category: % Value Growth 2019-2024

Table 64 - Sales of Hair Care by Premium vs Mass: % Value 2019-2024

Table 65 - NBO Company Shares of Hair Care: % Value 2020-2024

Table 66 - LBN Brand Shares of Hair Care: % Value 2021-2024

Table 67 - NBO Company Shares of Salon Professional Hair Care: % Value 2020-2024

Table 68 - LBN Brand Shares of Salon Professional Hair Care: % Value 2021-2024

Table 69 - LBN Brand Shares of Premium Hair Care: % Value 2021-2024

Table 70 - Forecast Sales of Hair Care by Category: Value 2024-2029

Table 71 - Forecast Sales of Hair Care by Category: % Value Growth 2024-2029

Table 72 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2024-2029

Men's Grooming in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Men's razors and blades account for most value sales

Gillette maintains commanding lead

Hypermarkets gain most value share

PROSPECTS AND OPPORTUNITIES

Men's pre-shave registers highest value growth

Social media increasingly influential

Focus on a more natural positioning

CATEGORY DATA

Table 73 - Sales of Men's Grooming by Category: Value 2019-2024

Table 74 - Sales of Men's Grooming by Category: % Value Growth 2019-2024

Table 75 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2021-2024

Table 76 - Sales of Men's Skin Care by Type: % Value Breakdown 2021-2024

Table 77 - NBO Company Shares of Men's Grooming: % Value 2020-2024
Table 78 - LBN Brand Shares of Men's Grooming: % Value 2021-2024
Table 79 - LBN Brand Shares of Men's Razors and Blades: % Value 2021-2024
Table 80 - Forecast Sales of Men's Grooming by Category: Value 2024-2029
Table 81 - Forecast Sales of Men's Grooming by Category: % Value Growth 2024-2029

Oral Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasing penetration in rural areas supports value sales
Global players continue to lead
Supermarkets pass out small local grocers for first time

PROSPECTS AND OPPORTUNITIES

Education campaigns drive further growth
Increasing demand for greener and more natural offerings
Continuing innovation to keep consumers engaged

CATEGORY DATA

Table 82 - Sales of Oral Care by Category: Value 2019-2024
Table 83 - Sales of Oral Care by Category: % Value Growth 2019-2024
Table 84 - Sales of Toothbrushes by Category: Value 2019-2024
Table 85 - Sales of Toothbrushes by Category: % Value Growth 2019-2024
Table 86 - Sales of Toothpaste by Type: % Value Breakdown 2020-2024
Table 87 - NBO Company Shares of Oral Care: % Value 2020-2024
Table 88 - LBN Brand Shares of Oral Care: % Value 2021-2024
Table 89 - Forecast Sales of Oral Care by Category: Value 2024-2029
Table 90 - Forecast Sales of Oral Care by Category: % Value Growth 2024-2029
Table 91 - Forecast Sales of Toothbrushes by Category: Value 2024-2029
Table 92 - Forecast Sales of Toothbrushes by Category: % Value Growth 2024-2029

Skin Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Facial care account for most value sales
Local company Nihel gains most value share
Beauty specialists lead distribution

PROSPECTS AND OPPORTUNITIES

Facial care registers highest value growth
Mass out performs premium
Increasing scrutiny of ingredients in skin care

CATEGORY DATA

Table 93 - Sales of Skin Care by Category: Value 2019-2024
Table 94 - Sales of Skin Care by Category: % Value Growth 2019-2024
Table 95 - NBO Company Shares of Skin Care: % Value 2020-2024
Table 96 - LBN Brand Shares of Skin Care: % Value 2021-2024
Table 97 - LBN Brand Shares of Premium Skin Care: % Value 2021-2024
Table 98 - Forecast Sales of Skin Care by Category: Value 2024-2029

Table 99 - Forecast Sales of Skin Care by Category: % Value Growth 2024-2029

Sun Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasing year-round demand boost sales

Nivea maintains solid lead

Beauty specialists lead distribution

PROSPECTS AND OPPORTUNITIES

Self-tanning registers highest value growth, though from low base

Blurring of lines between skin care and sun care

Continuing innovation over forecast period

CATEGORY DATA

Table 100 - Sales of Sun Care by Category: Value 2019-2024

Table 101 - Sales of Sun Care by Category: % Value Growth 2019-2024

Table 102 - Sales of Sun Care by Premium vs Mass: % Value 2019-2024

Table 103 - NBO Company Shares of Sun Care: % Value 2020-2024

Table 104 - LBN Brand Shares of Sun Care: % Value 2021-2024

Table 105 - LBN Brand Shares of Premium Adult Sun Care: % Value 2021-2024

Table 106 - Forecast Sales of Sun Care by Category: Value 2024-2029

Table 107 - Forecast Sales of Sun Care by Category: % Value Growth 2024-2029

Premium Beauty and Personal Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Premium fragrances accounts for most value sales

French brand SVR leads premium space

A feeling of indulgence, as well as clear benefits, drives value sales

PROSPECTS AND OPPORTUNITIES

Uncertain outlook over forecast period

E-commerce registers healthy value growth, but illicit trade still an issue

Growing competition from higher quality mass brands

CATEGORY DATA

Table 108 - Sales of Premium Beauty and Personal Care by Category: Value 2019-2024

Table 109 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 110 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2020-2024

Table 111 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2021-2024

Table 112 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2024-2029

Table 113 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2024-2029

Mass Beauty and Personal Care in Tunisia

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increasing offerings of local brands increases competition

Global companies continue to have significant foothold, but new local company launches with big ambitions

Price sensitivity gives boost to local brands

PROSPECTS AND OPPORTUNITIES

Economic risks support value sales for affordable mass offerings

Private label gains value share

Continuing innovation keeps consumers engaged

CATEGORY DATA

Table 114 - Sales of Mass Beauty and Personal Care by Category: Value 2019-2024

Table 115 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2019-2024

Table 116 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2020-2024

Table 117 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2021-2024

Table 118 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2024-2029

Table 119 - Forecast Sales of Mass Beauty and Personal 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/beauty-and-personal-care-in-tunisia/report.