



# Passport

## Analgesics in Tunisia

Euromonitor International

October 2021

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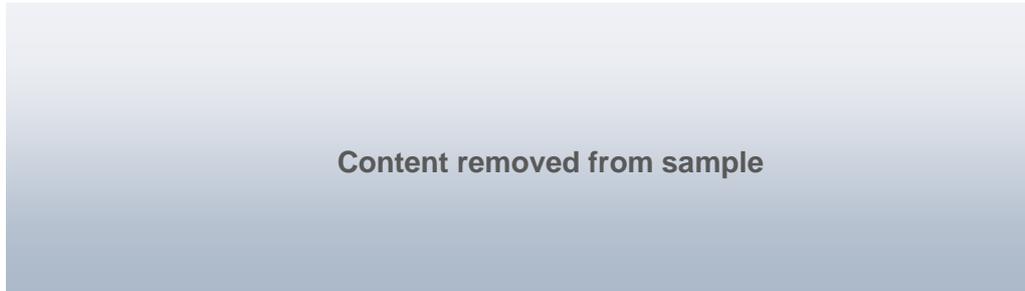
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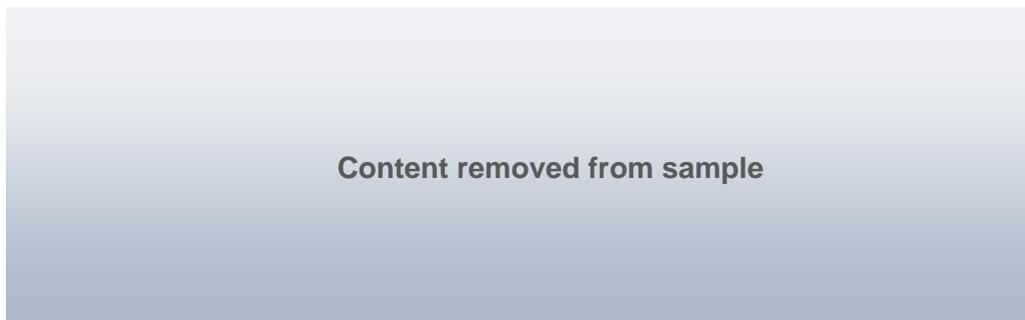
# ANALGESICS IN TUNISIA - CATEGORY ANALYSIS

## KEY DATA FINDINGS

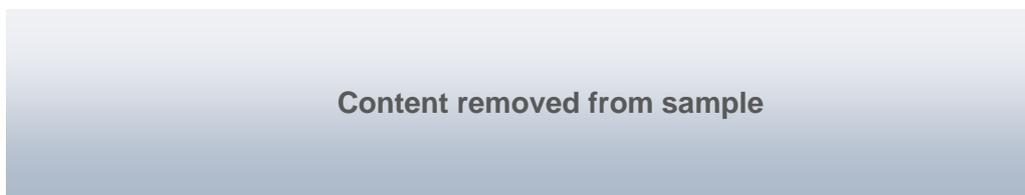


## 2021 DEVELOPMENTS

COVID-19 continues to strengthen volume sales of analgesics

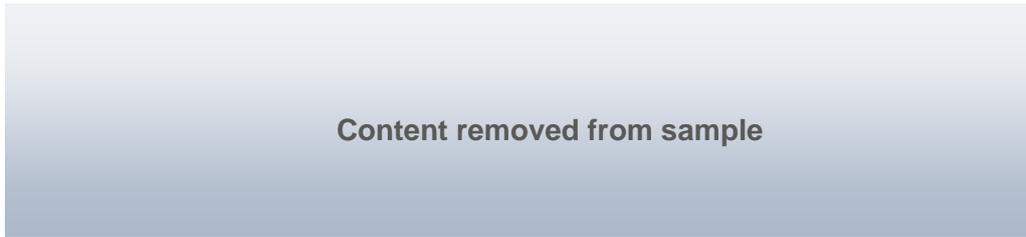


No shift towards e-commerce for analgesics



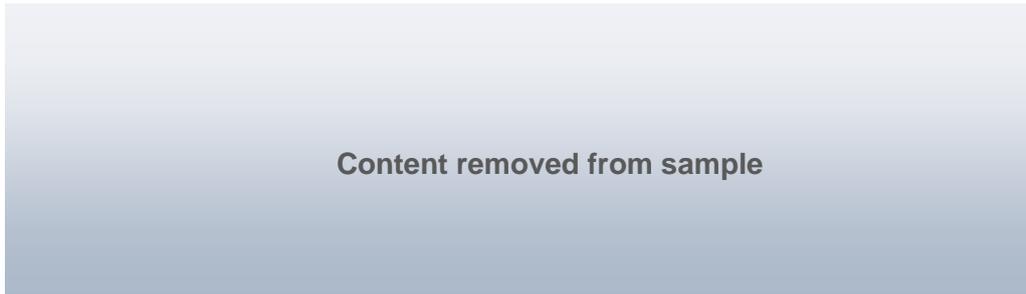
Analgesics remains dominated by locally-manufactured international brands



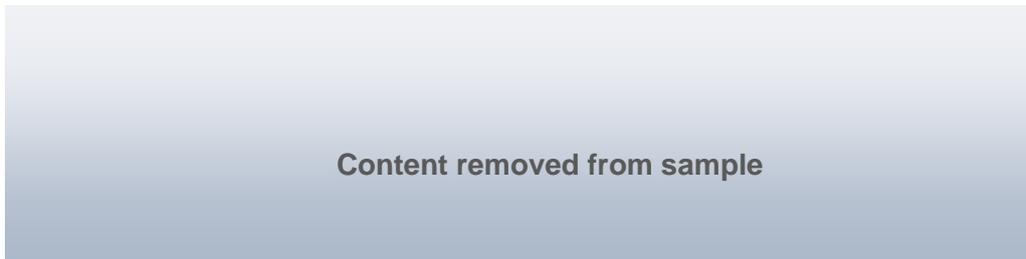


## PROSPECTS AND OPPORTUNITIES

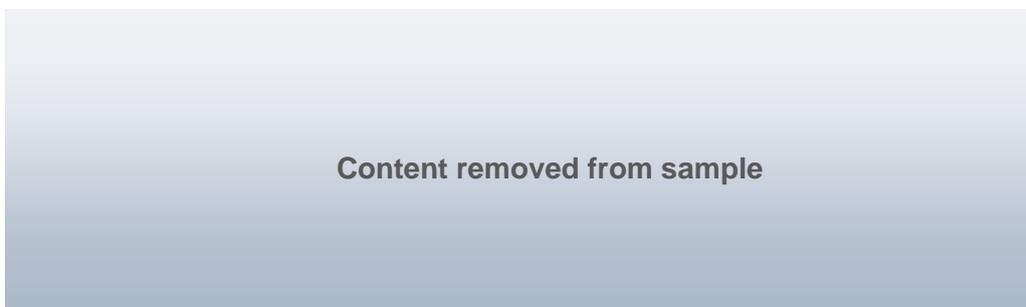
Preference for self-medication during minor ailments will keep demand for analgesics stable



Slow roll-out of vaccination will keep sales of analgesics buoyant



Competitive landscape likely to remain dominated by global brands produced locally



## CATEGORY DATA

**Table 1 Sales of Analgesics by Category: Value 2016-2021**

TND million	2016	2017	2018	2019	2020	2021
- Systemic Analgesics	<b>Data removed from sample</b>					
-- Adult Analgesics						
--- Adult Acetaminophen						
--- Adult Aspirin						
--- Adult Combination Products - Analgesics						
--- Adult Diclofenac						
--- Adult Dipyron						
--- Adult Ibuprofen						
--- Adult Ketoprofen						
--- Adult Naproxen						
--- Adult OTC Triptans						
-- Paediatric Analgesics						
--- Paediatric Acetaminophen						
--- Paediatric Aspirin						
--- Paediatric Combination Products - Analgesics						
--- Paediatric Dipyron						
--- Paediatric Ibuprofen						
--- Paediatric Naproxen						
-- Adult and Paediatric Systemic Analgesics						
--- Acetaminophen						
--- Aspirin						
--- Combination Products - Analgesics						
--- Diclofenac						
--- Dipyron						
--- Ibuprofen						
--- Ketoprofen						
--- Naproxen						
--- OTC Triptans						
- Topical Analgesics/ Anaesthetic Analgesics						

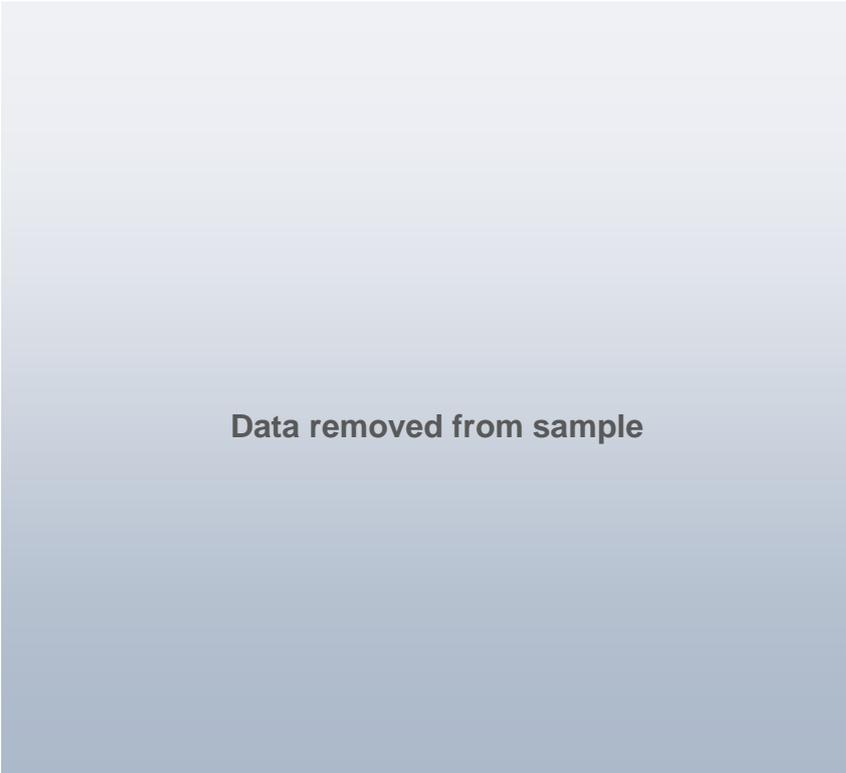
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

**Table 2 Sales of Analgesics by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Systemic Analgesics	<b>Data removed from sample</b>		
-- Adult Analgesics			
--- Adult Acetaminophen			
--- Adult Aspirin			
--- Adult Combination Products -			

- Analgesics
- Adult Diclofenac
- Adult Dipyron
- Adult Ibuprofen
- Adult Ketoprofen
- Adult Naproxen
- Adult OTC Triptans
- Paediatric Analgesics
- Paediatric Acetaminophen
- Paediatric Aspirin
- Paediatric Combination Products - Analgesics
- Paediatric Dipyron
- Paediatric Ibuprofen
- Paediatric Naproxen
- Adult and Paediatric Systemic Analgesics
- Acetaminophen
- Aspirin
- Combination Products - Analgesics
- Diclofenac
- Dipyron
- Ibuprofen
- Ketoprofen
- Naproxen
- OTC Triptans
- Topical Analgesics/Anaesthetic Analgesics



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 3 NBO Company Shares of Analgesics: % Value 2017-2021**

% retail value rsp Company	2017	2018	2019	2020	2021
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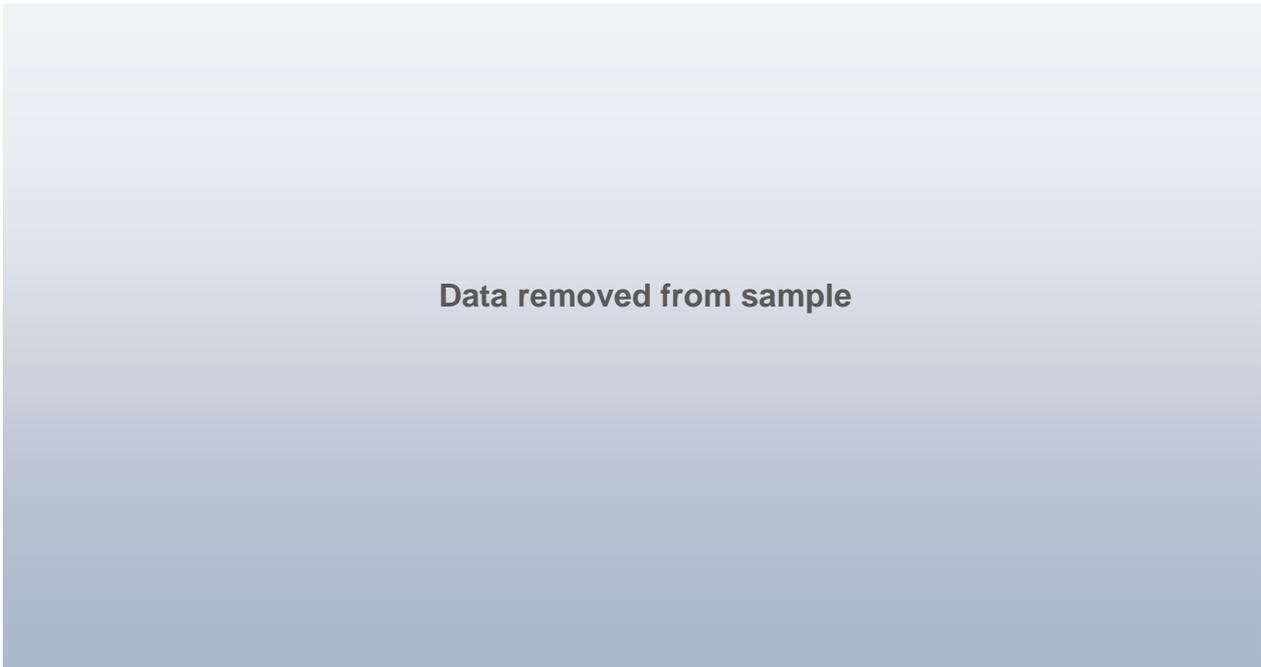
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 4** LBN Brand Shares of Analgesics: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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**Data removed from sample**



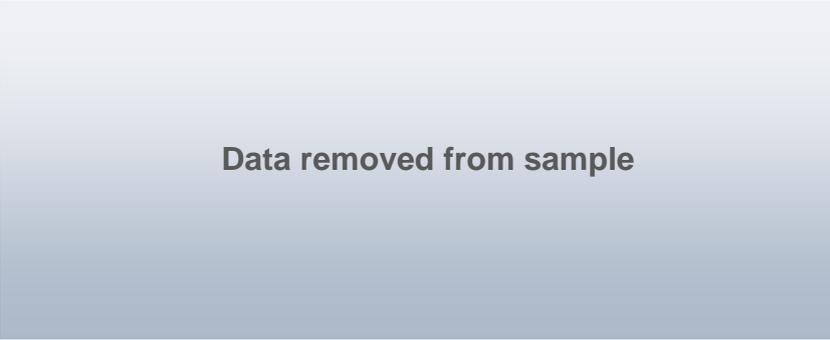
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 5 Forecast Sales of Analgesics by Category: Value 2021-2026**

TND million

	2021	2022	2023	2024	2025	2026
- Systemic Analgesics	Data removed from sample					
-- Adult Analgesics						
--- Adult Acetaminophen						
--- Adult Aspirin						
--- Adult Combination Products - Analgesics						
--- Adult Diclofenac						
--- Adult Dipyron						
--- Adult Ibuprofen						
--- Adult Ketoprofen						
--- Adult Naproxen						
--- Adult OTC Triptans						
-- Paediatric Analgesics						
--- Paediatric Acetaminophen						
--- Paediatric Aspirin						
--- Paediatric Combination Products - Analgesics						
--- Paediatric Dipyron						
--- Paediatric Ibuprofen						
--- Paediatric Naproxen						
-- Adult and Paediatric Systemic Analgesics						

- Acetaminophen
- Aspirin
- Combination Products - Analgesics
- Diclofenac
- Dipyron
- Ibuprofen
- Ketoprofen
- Naproxen
- OTC Triptans
- Topical Analgesics/ Anaesthetic Analgesics



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources  
 Note: 2021 data is provisional and based on part-year estimates

Table 6 Forecast Sales of Analgesics by Category: % Value Growth 2021-2026

% constant value growth

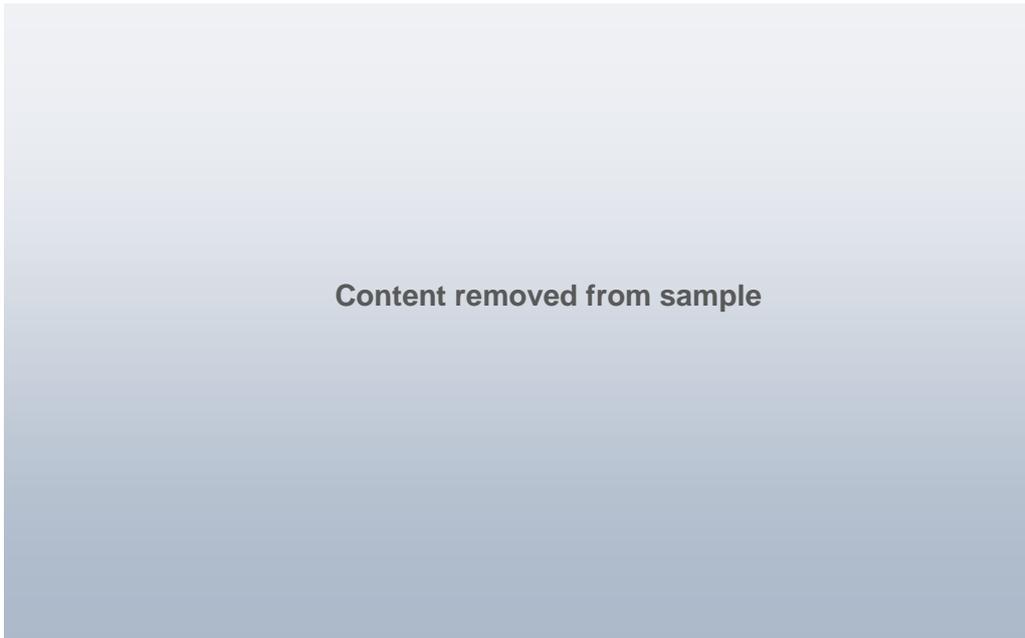
	2021/2022	2021-26 CAGR	2021/26 Total
- Systemic Analgesics			
-- Adult Analgesics			
--- Adult Acetaminophen			
--- Adult Aspirin			
--- Adult Combination Products - Analgesics			
--- Adult Diclofenac			
--- Adult Dipyron			
--- Adult Ibuprofen			
--- Adult Ketoprofen			
--- Adult Naproxen			
--- Adult OTC Triptans			
-- Paediatric Analgesics			
--- Paediatric Acetaminophen			
--- Paediatric Aspirin			
--- Paediatric Combination Products - Analgesics			
--- Paediatric Dipyron			
--- Paediatric Ibuprofen			
--- Paediatric Naproxen			
-- Adult and Paediatric Systemic Analgesics			
--- Acetaminophen			
--- Aspirin			
--- Combination Products - Analgesics			
--- Diclofenac			
--- Dipyron			
--- Ibuprofen			
--- Ketoprofen			
--- Naproxen			
--- OTC Triptans			
- Topical Analgesics/Anaesthetic Analgesics			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

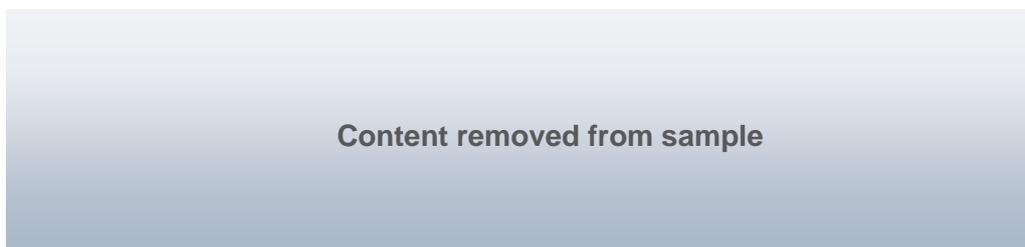
# CONSUMER HEALTH IN TUNISIA - INDUSTRY OVERVIEW

## EXECUTIVE SUMMARY

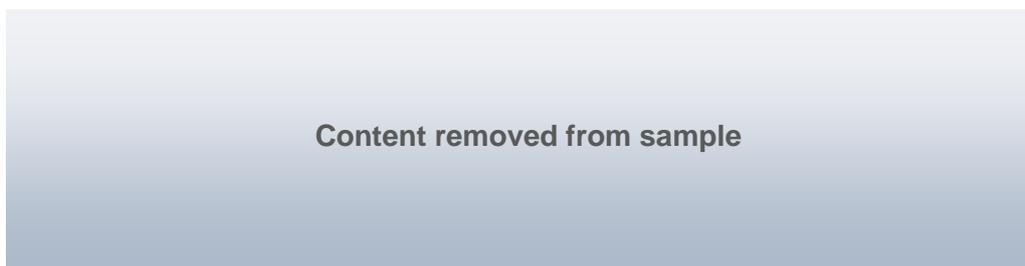
Consumer health in 2021: The big picture

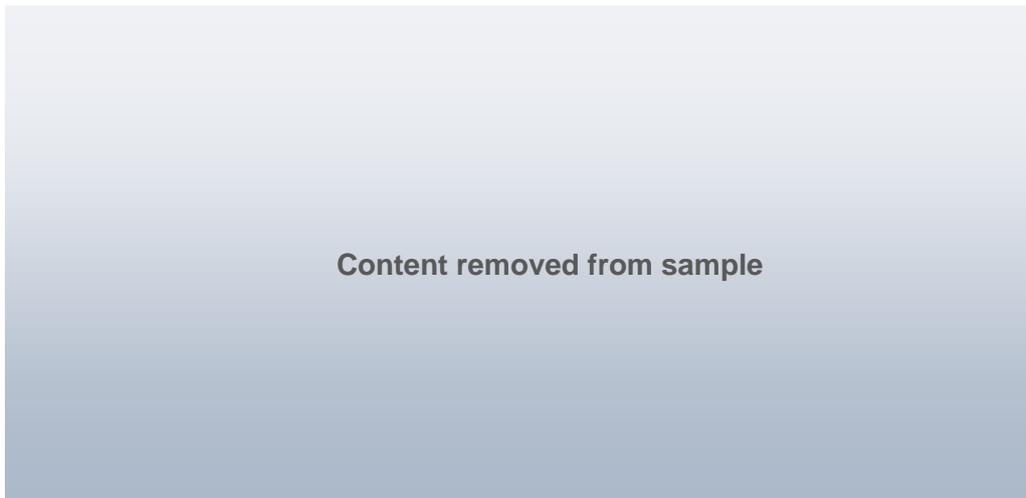


2021 key trends

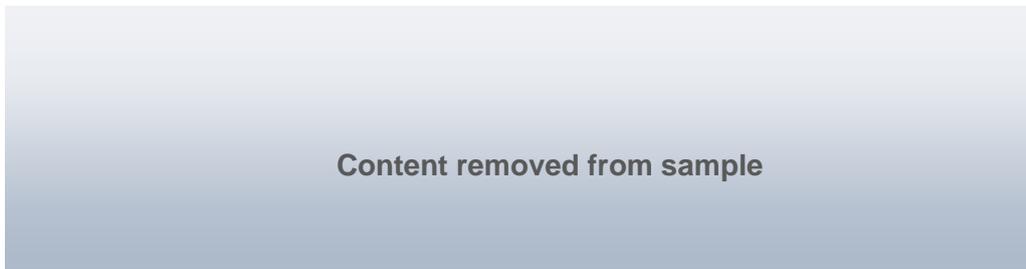


Competitive landscape

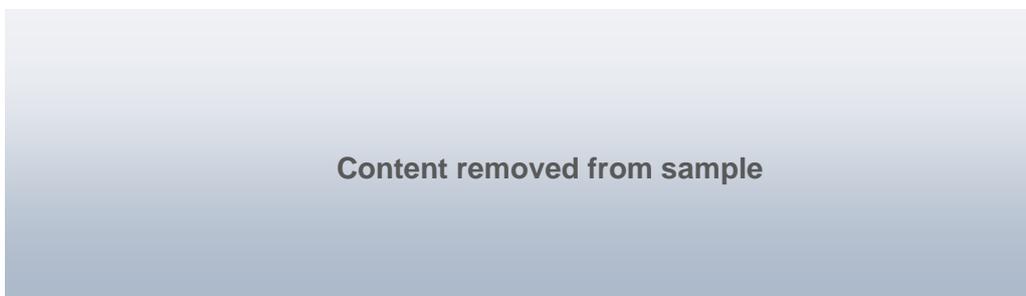




Retailing developments



What next for consumer health?



MARKET INDICATORS

Table 7 Consumer Expenditure on Health Goods and Medical Services: Value 2016-2021

TND million	2016	2017	2018	2019	2020	2021
Pharmaceuticals, medical appliances/ equipment	Data removed from sample					
Outpatient services						
Hospital services						
Total						

Source: Euromonitor International from official statistics, trade associations, trade interviews

**Table 8 Life Expectancy at Birth 2016-2021**

years	2016	2017	2018	2019	2020	2021
Males	<b>Data removed from sample</b>					
Females						

Source: Euromonitor International from official statistics

**MARKET DATA**

**Table 9 Sales of Consumer Health by Category: Value 2016-2021**

TND million	2016	2017	2018	2019	2020	2021
OTC	<b>Data removed from sample</b>					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 10 Sales of Consumer Health by Category: % Value Growth 2016-2021**

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
OTC	<b>Data removed from sample</b>		
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			
Consumer Health			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 11 NBO Company Shares of Consumer Health: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

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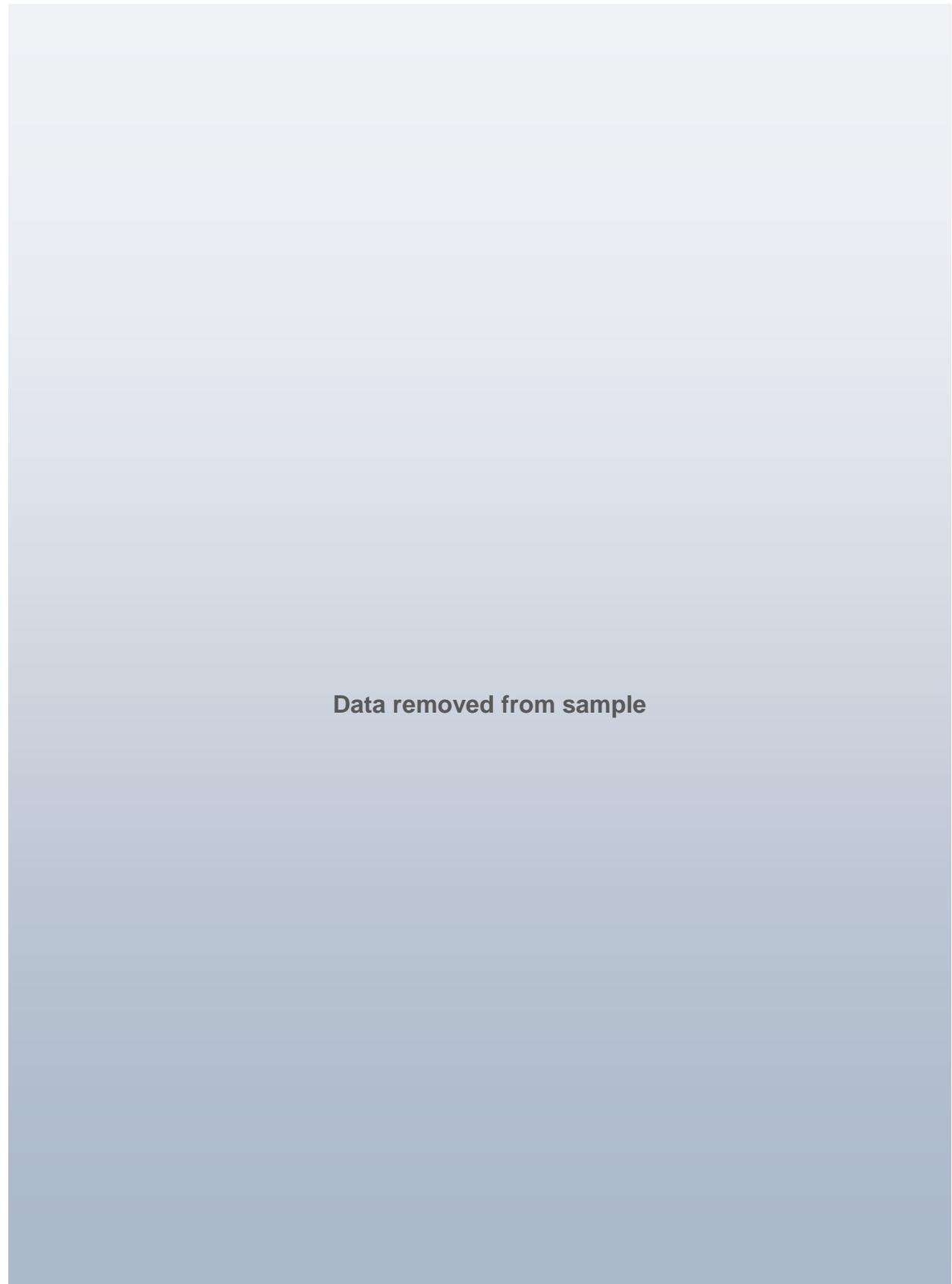
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 LBN Brand Shares of Consumer Health: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 13** Distribution of Consumer Health by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	<b>Data removed from sample</b>					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
--- Other Grocery Retailers						
---- Healthfood shops						
---- Other Other Grocery Retailers						
- Mixed Retailers						
-- Department Stores						
-- Mass Merchandisers						
-- Variety Stores						
-- Warehouse Clubs						
- Non-Grocery Specialists						
-- Health and Beauty Specialist Retailers						
--- Beauty Specialist Retailers						
--- Chemists/Pharmacies						
--- Optical Goods Stores						
--- Drugstores/parapharmacies						
--- Vitamins and Dietary Supplements Specialist Retailers						
--- Other Consumer Health Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- Homeshopping						
- E-Commerce						
- Direct Selling						
Total						

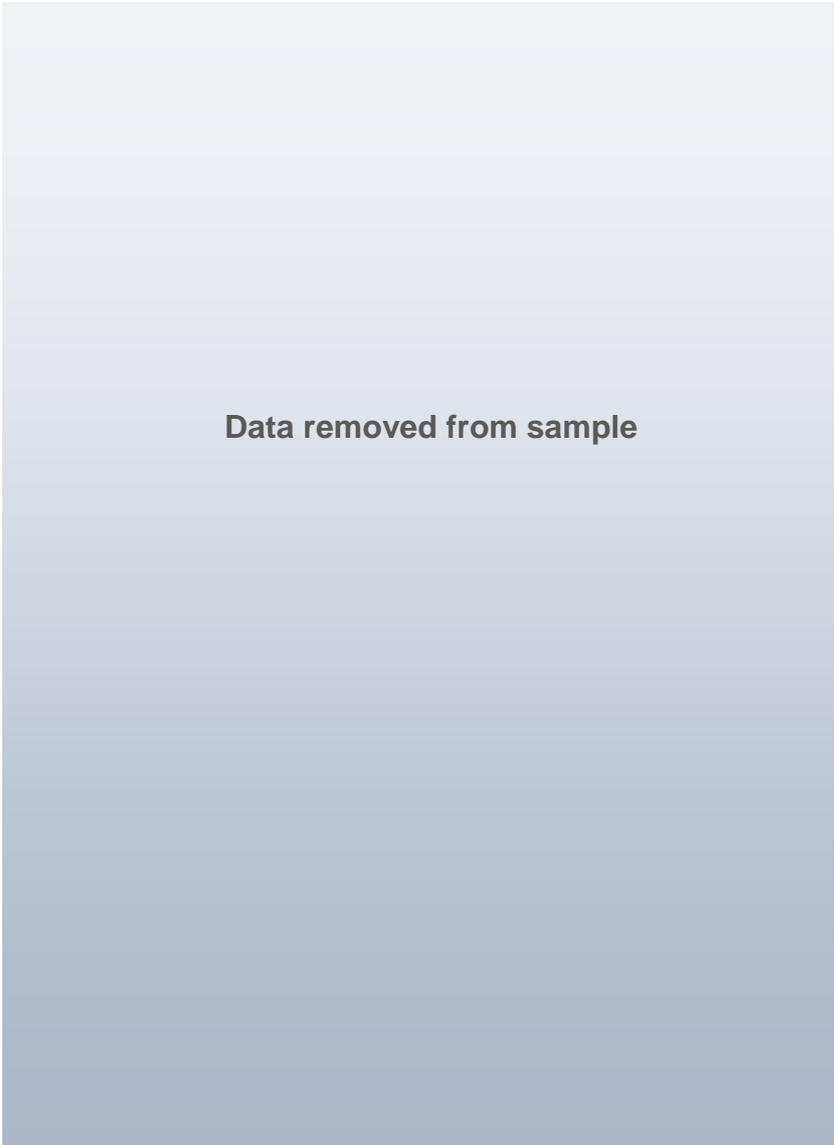
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 14** Distribution of Consumer Health by Format and Category: % Value 2021

% retail value rsp	OTC	Sports	Vitamins	Weight	Herbal/	Allergy
--------------------	-----	--------	----------	--------	---------	---------

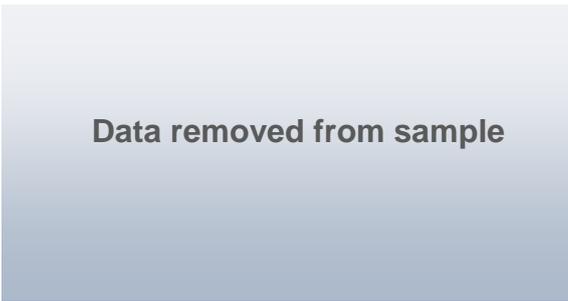
Nutrition and Dietary Supplements Management and Wellbeing Traditional Products Care

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Paediatric Consumer Health

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets



- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 15 Forecast Sales of Consumer Health by Category: Value 2021-2026

TND million	2021	2022	2023	2024	2025	2026
OTC	<b>Data removed from sample</b>					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 16** Forecast Sales of Consumer Health by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
OTC	<b>Data removed from sample</b>		
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			
Consumer Health			

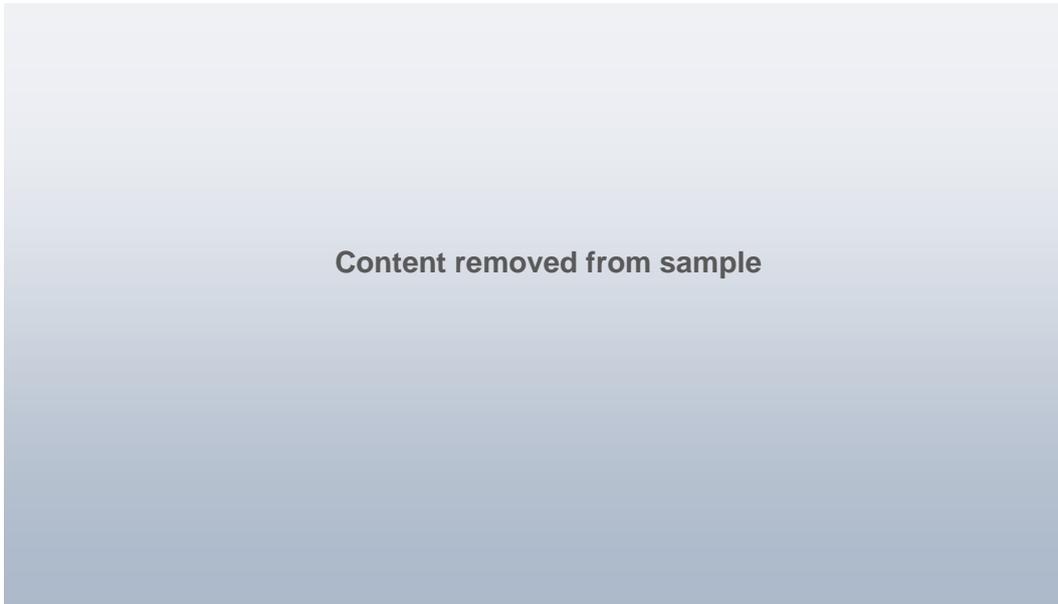
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

## APPENDIX

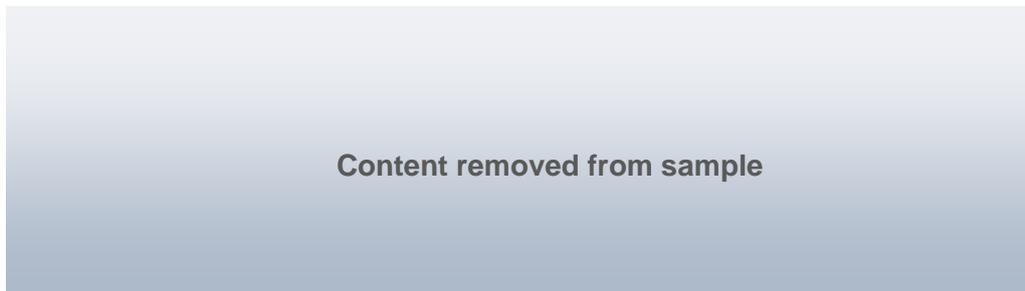
### OTC registration and classification

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## Vitamins and dietary supplements registration and classification



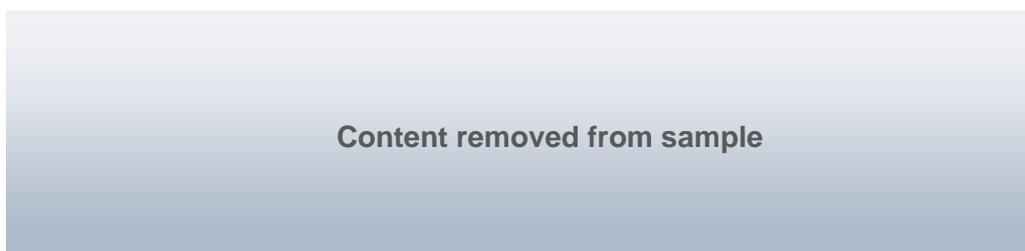
## Self-medication/self-care and preventive medicine



## Switches



## DISCLAIMER



## DEFINITIONS

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## SOURCES

Sources used during the research included the following:

Summary 1    Research Sources

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Source: Euromonitor International