

# Home Care in Tunisia

February 2024

Table of Contents

## Home Care in Tunisia

### EXECUTIVE SUMMARY

Home care in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

What next for home care?

### MARKET INDICATORS

Table 1 - Households 2018-2023

### MARKET DATA

Table 2 - Sales of Home Care by Category: Value 2018-2023

Table 3 - Sales of Home Care by Category: % Value Growth 2018-2023

Table 4 - NBO Company Shares of Home Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Home Care: % Value 2020-2023

Table 6 - Penetration of Private Label in Home Care by Category: % Value 2018-2023

Table 7 - Distribution of Home Care by Format: % Value 2018-2023

Table 8 - Distribution of Home Care by Format and Category: % Value 2023

Table 9 - Forecast Sales of Home Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Home Care by Category: % Value Growth 2023-2028

### DISCLAIMER

### SOURCES

Summary 1 - Research Sources

## Air Care in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Home-made candle air fresheners is a key category trend

Gel air fresheners struggles to develop and grow

Smaller players and private label retailers exert pressure on the leading branded manufacturers

#### PROSPECTS AND OPPORTUNITIES

Combination of affordability and accessibility to see a shift to liquid air fresheners

Spray/aerosol air fresheners to experience a level of stagnation

Retail e-commerce is expected to continue to develop and grow

### CATEGORY DATA

Table 11 - Sales of Air Care by Category: Value 2018-2023

Table 12 - Sales of Air Care by Category: % Value Growth 2018-2023

Table 13 - NBO Company Shares of Air Care: % Value 2019-2023

Table 14 - LBN Brand Shares of Air Care: % Value 2020-2023

Table 15 - Forecast Sales of Air Care by Category: Value 2023-2028

Table 16 - Forecast Sales of Air Care by Category: % Value Growth 2023-2028

## Bleach in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Bleach price increase in 2023 favours retail value over volume growth  
Judy remains the leading brand despite growing competition  
Absence of international players amid strong local brands

#### PROSPECTS AND OPPORTUNITIES

Promotions are expected to continue to drive growth opportunities  
El Jmal to enter the fray in bleach  
The disappearance of unbranded bleach amid rising consumer health and safety awareness

#### CATEGORY DATA

Table 17 - Sales of Bleach: Value 2018-2023  
Table 18 - Sales of Bleach: % Value Growth 2018-2023  
Table 19 - NBO Company Shares of Bleach: % Value 2019-2023  
Table 20 - LBN Brand Shares of Bleach: % Value 2020-2023  
Table 21 - Forecast Sales of Bleach: Value 2023-2028  
Table 22 - Forecast Sales of Bleach: % Value Growth 2023-2028

### Dishwashing in Tunisia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Automatic dishwashing records the highest retail volume and value growth  
Modern grocery retailers remain the main sellers of automatic dishwashing products  
Domestic brands continue to erode Pril's retail value share

#### PROSPECTS AND OPPORTUNITIES

Marketing and promotion are expected to be key competitive tools in the forecast period  
Growing challenge to Pril's leadership of hand dishwashing  
Automatic dishwashing to continue strong growth performance over the forecast period

#### CATEGORY INDICATORS

Table 23 - Household Possession of Dishwashers 2017-2022

#### CATEGORY DATA

Table 24 - Sales of Dishwashing by Category: Value 2018-2023  
Table 25 - Sales of Dishwashing by Category: % Value Growth 2018-2023  
Table 26 - NBO Company Shares of Dishwashing: % Value 2019-2023  
Table 27 - LBN Brand Shares of Dishwashing: % Value 2020-2023  
Table 28 - Forecast Sales of Dishwashing by Category: Value 2023-2028  
Table 29 - Forecast Sales of Dishwashing by Category: % Value Growth 2023-2028

### Home Insecticides in Tunisia

#### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Dominant spray/aerosol insecticides continues to see the highest growth in retail volume and value terms in 2023  
Fierce competition at the top of the rankings  
Influx of imported brands as players try to tap into a robust growth category

#### PROSPECTS AND OPPORTUNITIES

Spray/aerosol insecticides to continue to leverage convenience, effectiveness and wide availability  
Hygiene and infestation concerns to boost the use of insecticide baits  
Manufacturers need to heed safety concerns

## CATEGORY DATA

Table 30 - Sales of Home Insecticides by Category: Value 2018-2023

Table 31 - Sales of Home Insecticides by Category: % Value Growth 2018-2023

Table 32 - NBO Company Shares of Home Insecticides: % Value 2019-2023

Table 33 - LBN Brand Shares of Home Insecticides: % Value 2020-2023

Table 34 - Forecast Sales of Home Insecticides by Category: Value 2023-2028

Table 35 - Forecast Sales of Home Insecticides by Category: % Value Growth 2023-2028

## Laundry Care in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growth in liquid detergents limits liquid fabric softeners

Société El Jmal continues to increase its presence and importance in laundry care

Tight competition between international and local brands

#### PROSPECTS AND OPPORTUNITIES

Local companies to make gains

Industry push for liquid detergents

Spot and stain removers to develop and grow strongly

### CATEGORY INDICATORS

Table 36 - Household Possession of Washing Machines 2018-2023

## CATEGORY DATA

Table 37 - Sales of Laundry Care by Category: Value 2018-2023

Table 38 - Sales of Laundry Care by Category: % Value Growth 2018-2023

Table 39 - Sales of Laundry Aids by Category: Value 2018-2023

Table 40 - Sales of Laundry Aids by Category: % Value Growth 2018-2023

Table 41 - Sales of Laundry Detergents by Category: Value 2018-2023

Table 42 - Sales of Laundry Detergents by Category: % Value Growth 2018-2023

Table 43 - NBO Company Shares of Laundry Care: % Value 2019-2023

Table 44 - LBN Brand Shares of Laundry Care: % Value 2020-2023

Table 45 - NBO Company Shares of Laundry Aids: % Value 2019-2023

Table 46 - LBN Brand Shares of Laundry Aids: % Value 2020-2023

Table 47 - NBO Company Shares of Laundry Detergents: % Value 2019-2023

Table 48 - LBN Brand Shares of Laundry Detergents: % Value 2020-2023

Table 49 - Forecast Sales of Laundry Care by Category: Value 2023-2028

Table 50 - Forecast Sales of Laundry Care by Category: % Value Growth 2023-2028

## Polishes in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Growing awareness and accessibility boost metal polish in 2023

Limited presence of domestic brands

Retail e-commerce emergence supports the distribution of polishes

#### PROSPECTS AND OPPORTUNITIES

Young couples to spur demand for furniture polish

Development of local presence over the forecast period

Growing urban consumer base to change category dynamics

## CATEGORY DATA

Table 51 - Sales of Polishes by Category: Value 2018-2023

Table 52 - Sales of Polishes by Category: % Value Growth 2018-2023

Table 53 - NBO Company Shares of Polishes: % Value 2019-2023

Table 54 - LBN Brand Shares of Polishes: % Value 2020-2023

Table 55 - Forecast Sales of Polishes by Category: Value 2023-2028

Table 56 - Forecast Sales of Polishes by Category: % Value Growth 2023-2028

## Surface Care in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

A growing presence of international brands in modern grocery retailers

Multi-purpose cleaners leads the field in surface care

Standard floor cleaners are popular purchases in traditional retailers

### PROSPECTS AND OPPORTUNITIES

Polarisation anticipated in distribution

Important development of the local surface care offer is expected over the forecast period

Strong competition among domestic players to add dynamism to surface care

## CATEGORY DATA

Table 57 - Sales of Surface Care by Category: Value 2018-2023

Table 58 - Sales of Surface Care by Category: % Value Growth 2018-2023

Table 59 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: Value 2018-2023

Table 60 - Sales of Home Care Wipes and Floor Cleaning Systems by Category: % Value Growth 2018-2023

Table 61 - NBO Company Shares of Surface Care: % Value 2019-2023

Table 62 - LBN Brand Shares of Surface Care: % Value 2020-2023

Table 63 - Forecast Sales of Surface Care by Category: Value 2023-2028

Table 64 - Forecast Sales of Surface Care by Category: % Value Growth 2023-2028

## Toilet Care in Tunisia

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Modern grocery outlets are the main retailers of imported brands

Fierce competition between local and international players

Private label consolidates a presence in toilet care in Tunisia

### PROSPECTS AND OPPORTUNITIES

Faster growth expected as toilet care develops in line with the demand for specialised options

Distribution through modern grocery retailers is set to grow

Inflation and rising prices pose the primary threats to category advancement

## CATEGORY DATA

Table 65 - Sales of Toilet Care by Category: Value 2018-2023

Table 66 - Sales of Toilet Care by Category: % Value Growth 2018-2023

Table 67 - NBO Company Shares of Toilet Care: % Value 2019-2023

Table 68 - LBN Brand Shares of Toilet Care: % Value 2020-2023

Table 69 - Forecast Sales of Toilet Care by Category: Value 2023-2028

Table 70 - Forecast Sales of Toilet Care by Category: % Value Growth 2023-2028

## 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](http://www.euromonitor.com/home-care-in-tunisia/report).