



Beauty and Personal Care in Morocco

June 2024

Table of Contents

Beauty and Personal Care in Morocco

EXECUTIVE SUMMARY

Beauty and personal care in 2023: The big picture

2023 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 2018-2023

Table 2 - Sales of Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 3 - GBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 4 - NBO Company Shares of Beauty and Personal Care: % Value 2019-2023

Table 5 - LBN Brand Shares of Beauty and Personal Care: % Value 2020-2023

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

Table 7 - Distribution of Beauty and Personal Care by Format: % Value 2018-2023

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

Table 9 - Forecast Sales of Beauty and Personal Care by Category: Value 2023-2028

Table 10 - Forecast Sales of Beauty and Personal Care by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby and Child-Specific Products in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Contracting consumer base

Baby wipes use extends beyond babies

Category primarily focused on babies

PROSPECTS AND OPPORTUNITIES

Obstacles to category development

Long-term trends in the birth rate likely to remain unfavourable

Further growth for baby wipes

CATEGORY DATA

Table 11 - Sales of Baby and Child-specific Products by Category: Value 2018-2023

Table 12 - Sales of Baby and Child-specific Products by Category: % Value Growth 2018-2023

Table 13 - Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2018-2023

Table 14 - NBO Company Shares of Baby and Child-specific Products: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby and Child-specific Products: % Value 2020-2023

Table 16 - LBN Brand Shares of Baby and Child-specific Skin Care: % Value 2020-2023

Table 17 - LBN Brand Shares of Baby and Child-specific Sun Care: % Value 2020-2023

Table 18 - LBN Brand Shares of Premium Baby and Child-specific Products: % Value 2020-2023

Table 19 - Forecast Sales of Baby and Child-specific Products by Category: Value 2023-2028

Table 20 - Forecast Sales of Baby and Child-specific Products by Category: % Value Growth 2023-2028

Table 21 - Forecast Sales of Baby and Child-specific Products by Premium vs Mass: % Value 2023-2028

Bath and Shower in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift from bar soap to body wash/shower gel and liquid soap

New product developments

Lesieur Cristal achieves share gains through discounts

PROSPECTS AND OPPORTUNITIES

Pressure to develop new products

Hygiene awareness to drive growth

Essential status provides insurance against shifts in consumer purchasing behaviour

CATEGORY DATA

Table 22 - Sales of Bath and Shower by Category: Value 2018-2023

Table 23 - Sales of Bath and Shower by Category: % Value Growth 2018-2023

Table 24 - Sales of Bath and Shower by Premium vs Mass: % Value 2018-2023

Table 25 - NBO Company Shares of Bath and Shower: % Value 2019-2023

Table 26 - LBN Brand Shares of Bath and Shower: % Value 2020-2023

Table 27 - LBN Brand Shares of Premium Bath and Shower: % Value 2020-2023

Table 28 - Forecast Sales of Bath and Shower by Category: Value 2023-2028

Table 29 - Forecast Sales of Bath and Shower by Category: % Value Growth 2023-2028

Table 30 - Forecast Sales of Bath and Shower by Premium vs Mass: % Value 2023-2028

Colour Cosmetics in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strong demand for lip products

Eye and facial make-up make notable contribution to overall growth

Huda Beauty benefits from local partnership

PROSPECTS AND OPPORTUNITIES

Functionality to increasingly overlap with skin care

New product launches to play part in driving growth

Colour cosmetics to continue facing limits on demand due to narrow consumer base

CATEGORY DATA

Table 31 - Sales of Colour Cosmetics by Category: Value 2018-2023

Table 32 - Sales of Colour Cosmetics by Category: % Value Growth 2018-2023

Table 33 - NBO Company Shares of Colour Cosmetics: % Value 2019-2023

Table 34 - LBN Brand Shares of Colour Cosmetics: % Value 2020-2023

Table 35 - LBN Brand Shares of Eye Make-up: % Value 2020-2023

Table 36 - LBN Brand Shares of Facial Make-up: % Value 2020-2023

Table 37 - LBN Brand Shares of Lip Products: % Value 2020-2023

Table 38 - LBN Brand Shares of Nail Products: % Value 2020-2023

Table 39 - LBN Brand Shares of Premium Colour Cosmetics: % Value 2020-2023

Table 40 - Forecast Sales of Colour Cosmetics by Category: Value 2023-2028

Table 41 - Forecast Sales of Colour Cosmetics by Category: % Value Growth 2023-2028

Deodorants in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Deodorants used as replacement for fragrances in challenging economic environment
Unilever closes gap on leader
Growing interest in dermatologically tested products

PROSPECTS AND OPPORTUNITIES

Deodorants vulnerable to shifts in consumer behaviour
Deodorant sprays to maintain significance
Growing interest in natural, mineral and dermo products

CATEGORY DATA

Table 42 - Sales of Deodorants by Category: Value 2018-2023
Table 43 - Sales of Deodorants by Category: % Value Growth 2018-2023
Table 44 - Sales of Deodorants by Premium vs Mass: % Value 2018-2023
Table 45 - NBO Company Shares of Deodorants: % Value 2019-2023
Table 46 - LBN Brand Shares of Deodorants: % Value 2020-2023
Table 47 - LBN Brand Shares of Premium Deodorants: % Value 2020-2023
Table 48 - Forecast Sales of Deodorants by Category: Value 2023-2028
Table 49 - Forecast Sales of Deodorants by Category: % Value Growth 2023-2028
Table 50 - Forecast Sales of Deodorants by Premium Vs Mass: % Value 2023-2028

Depilatories in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growth despite economic challenges
Demand amongst lower-income segment drives growth in women's razors and blades
Traditional options remain popular

PROSPECTS AND OPPORTUNITIES

Ongoing economic pressures, but growth expected in women's razors and blades
Increased participation in paid workforce to support growth
Use of men's products presents threat to category development

CATEGORY DATA

Table 51 - Sales of Depilatories by Category: Value 2018-2023
Table 52 - Sales of Depilatories by Category: % Value Growth 2018-2023
Table 53 - Sales of Women's Razors and Blades by Type: % Value Breakdown 2019-2023
Table 54 - NBO Company Shares of Depilatories: % Value 2019-2023
Table 55 - LBN Brand Shares of Depilatories: % Value 2020-2023
Table 56 - Forecast Sales of Depilatories by Category: Value 2023-2028
Table 57 - Forecast Sales of Depilatories by Category: % Value Growth 2023-2028

Fragrances in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Women's mass fragrances benefits from direct selling
Masstige segment undermines premium sales
Unisex fragrances continue to struggle

PROSPECTS AND OPPORTUNITIES

Positive outlook despite challenges
Masstige products pose threat to premium brands

Mass women's fragrances to remain dominant

CATEGORY DATA

Table 58 - Sales of Fragrances by Category: Value 2018-2023

Table 59 - Sales of Fragrances by Category: % Value Growth 2018-2023

Table 60 - NBO Company Shares of Fragrances: % Value 2019-2023

Table 61 - LBN Brand Shares of Fragrances: % Value 2020-2023

Table 62 - LBN Brand Shares of Premium Men's Fragrances: % Value 2020-2023

Table 63 - LBN Brand Shares of Premium Women's Fragrances: % Value 2020-2023

Table 64 - Forecast Sales of Fragrances by Category: Value 2023-2028

Table 65 - Forecast Sales of Fragrances by Category: % Value Growth 2023-2028

Hair Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Dry hair a key consumer concern

Manufacturers turn attention to conditioners

Mass brands dominate

PROSPECTS AND OPPORTUNITIES

Innovation expected as manufacturers seek to stimulate demand

Significant potential in conditioners

Challenging economic scenario likely to lead to pricing competition

CATEGORY DATA

Table 66 - Sales of Hair Care by Category: Value 2018-2023

Table 67 - Sales of Hair Care by Category: % Value Growth 2018-2023

Table 68 - Sales of Hair Care by Premium vs Mass: % Value 2018-2023

Table 69 - NBO Company Shares of Hair Care: % Value 2019-2023

Table 70 - NBO Company Shares of Salon Professional Hair Care: % Value 2019-2023

Table 71 - LBN Brand Shares of Hair Care: % Value 2020-2023

Table 72 - LBN Brand Shares of Colourants: % Value 2020-2023

Table 73 - LBN Brand Shares of Salon Professional Hair Care: % Value 2020-2023

Table 74 - LBN Brand Shares of Styling Agents: % Value 2020-2023

Table 75 - LBN Brand Shares of Premium Hair Care: % Value 2020-2023

Table 76 - Forecast Sales of Hair Care by Category: Value 2023-2028

Table 77 - Forecast Sales of Hair Care by Category: % Value Growth 2023-2028

Table 78 - Forecast Sales of Hair Care by Premium vs Mass: % Value 2023-2028

Men's Grooming in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Men's shaving adversely affected by fashion

Growth in mass men's deodorants

Demand for men's grooming products remains low despite shifts in attitude

PROSPECTS AND OPPORTUNITIES

Continued expansion from low base

Further growth for deodorants

Men's shaving to remain important despite ongoing trend towards less frequent shaving

CATEGORY DATA

Table 79 - Sales of Men's Grooming by Category: Value 2018-2023

Table 80 - Sales of Men's Grooming by Category: % Value Growth 2018-2023

Table 81 - Sales of Men's Razors and Blades by Type: % Value Breakdown 2020-2023

Table 82 - Sales of Men's Skin Care by Type: % Value Breakdown 2020-2023

Table 83 - NBO Company Shares of Men's Grooming: % Value 2019-2023

Table 84 - LBN Brand Shares of Men's Grooming: % Value 2020-2023

Table 85 - LBN Brand Shares of Men's Razors and Blades: % Value 2020-2023

Table 86 - Forecast Sales of Men's Grooming by Category: Value 2023-2028

Table 87 - Forecast Sales of Men's Grooming by Category: % Value Growth 2023-2028

Oral Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers commit to more rigorous oral care routines

Toothpaste benefits from rising consumer health awareness

Toothbrushes sees promotional activity and child-focused innovation

PROSPECTS AND OPPORTUNITIES

Ongoing increase in awareness of oral hygiene

Innovation and promotional activity to continue

Essential status to insulate oral care against impact of difficult economic conditions

CATEGORY DATA

Table 88 - Sales of Oral Care by Category: Value 2018-2023

Table 89 - Sales of Oral Care by Category: % Value Growth 2018-2023

Table 90 - Sales of Toothbrushes by Category: Value 2018-2023

Table 91 - Sales of Toothbrushes by Category: % Value Growth 2018-2023

Table 92 - Sales of Toothpaste by Type: % Value Breakdown 2019-2023

Table 93 - NBO Company Shares of Oral Care: % Value 2019-2023

Table 94 - LBN Brand Shares of Oral Care: % Value 2020-2023

Table 95 - LBN Brand Shares of Mouthwashes/Dental Rinses: % Value 2020-2023

Table 96 - LBN Brand Shares of Toothpaste: % Value 2020-2023

Table 97 - Forecast Sales of Oral Care by Category: Value 2023-2028

Table 98 - Forecast Sales of Oral Care by Category: % Value Growth 2023-2028

Table 99 - Forecast Sales of Toothbrushes by Category: Value 2023-2028

Table 100 - Forecast Sales of Toothbrushes by Category: % Value Growth 2023-2028

Skin Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Growing demand for dermocosmetics

Interest in skin brightening products

Anti-agers category sees dynamic growth

PROSPECTS AND OPPORTUNITIES

Positive outlook with further expansion for dermocosmetics

Bright prospects for facial care

Dynamism expected in mass anti-agers

CATEGORY DATA

- Table 101 - Sales of Skin Care by Category: Value 2018-2023
- Table 102 - Sales of Skin Care by Category: % Value Growth 2018-2023
- Table 103 - NBO Company Shares of Skin Care: % Value 2019-2023
- Table 104 - LBN Brand Shares of Skin Care: % Value 2020-2023
- Table 105 - LBN Brand Shares of Basic Moisturisers: % Value 2020-2023
- Table 106 - LBN Brand Shares of Anti-agers: % Value 2020-2023
- Table 107 - LBN Brand Shares of Firming Body Care: % Value 2020-2023
- Table 108 - LBN Brand Shares of General Purpose Body Care: % Value 2020-2023
- Table 109 - LBN Brand Shares of Premium Skin Care: % Value 2020-2023
- Table 110 - Forecast Sales of Skin Care by Category: Value 2023-2028
- Table 111 - Forecast Sales of Skin Care by Category: % Value Growth 2023-2028

Sun Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Strong demand for dermocosmetics sun care
- Sun protection dominates
- Aftersun seen as redundant

PROSPECTS AND OPPORTUNITIES

- Rising health awareness set to boost demand
- Sun care expected to continue to dominate
- New product developments to spur growth

CATEGORY DATA

- Table 112 - Sales of Sun Care by Category: Value 2018-2023
- Table 113 - Sales of Sun Care by Category: % Value Growth 2018-2023
- Table 114 - NBO Company Shares of Sun Care: % Value 2019-2023
- Table 115 - LBN Brand Shares of Sun Care: % Value 2020-2023
- Table 116 - LBN Brand Shares of Premium Adult Sun Care: % Value 2020-2023
- Table 117 - Forecast Sales of Sun Care by Category: Value 2023-2028
- Table 118 - Forecast Sales of Sun Care by Category: % Value Growth 2023-2028

Premium Beauty and Personal Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

- Consumers looking for high quality
- Purchasing power presents significant obstacle to premium development
- Competitive pressure from masstige segment

PROSPECTS AND OPPORTUNITIES

- Economic conditions present considerable challenge
- Opportunities for premium skin care
- Consumers expected to continue to focus on value for money

CATEGORY DATA

- Table 119 - Sales of Premium Beauty and Personal Care by Category: Value 2018-2023
- Table 120 - Sales of Premium Beauty and Personal Care by Category: % Value Growth 2018-2023
- Table 121 - NBO Company Shares of Premium Beauty and Personal Care: % Value 2019-2023

Table 122 - LBN Brand Shares of Premium Beauty and Personal Care: % Value 2020-2023

Table 123 - Forecast Sales of Premium Beauty and Personal Care by Category: Value 2023-2028

Table 124 - Forecast Sales of Premium Beauty and Personal Care by Category: % Value Growth 2023-2028

Mass Beauty and Personal Care in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Migration to masstige products boosts performance of mass skin care

Mass colour cosmetics sees continued revival after pandemic

Mass hair care sees introduction of value-added products

PROSPECTS AND OPPORTUNITIES

Consumer budget consciousness to drive shift to mass segment in essential areas

Positive image of mass products to spur shift from luxury segment

Mass products to reinforce dominant position in hair care

CATEGORY DATA

Table 125 - Sales of Mass Beauty and Personal Care by Category: Value 2018-2023

Table 126 - Sales of Mass Beauty and Personal Care by Category: % Value Growth 2018-2023

Table 127 - NBO Company Shares of Mass Beauty and Personal Care: % Value 2019-2023

Table 128 - LBN Brand Shares of Mass Beauty and Personal Care: % Value 2020-2023

Table 129 - Forecast Sales of Mass Beauty and Personal Care by Category: Value 2023-2028

Table 130 - Forecast Sales of Mass Beauty and Personal 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/beauty-and-personal-care-in-morocco/report.