

COSMETICS · TUNISIA · EXECUTIVE EDITION

Lodet · Competitive Landscape

Where Lodet stands against L'Oreal, and the ground a smaller house can actually win.

DOCUMENT	PREPARED	SCOPE	STATUS
LDT-26-332	October 2026	57 products · L'Oreal FY2024	Illustrative · not audited

01

The read

Lodet does not compete with L'Oreal on size, and should not try. It wins where a global portfolio is slow: a 57-product shelf that a woman in Tunis reads in seconds, prices from 11 to 79 dinars, and a voice that speaks French and Arabic at home. This market briefing asks one question of that advantage: **Where can a Tunisian house win against a global portfolio?**

57	20	8	97
products on the Lodet shelf	median price, TND (about €6)	categories, hair-led	TND for the full Amino hair ritual

WHAT HOLDS

A clear entry rung: 29 products at 20 TND or less. A house line (L'Odet Amino, Hydra-Hyaluronique, Bloom and Sublime mists) that carries the brand at 29 to 79 TND. Large 1000 ml formats that cost her 1.8 TND per 100 ml.

WHAT TO FIX

Hair is 53% of the shelf, so skin and mist are under-built for the gifting she already does. 28 products are on sale, which risks training her to wait. Claims wording still describes rather than specifies.

> The plan: keep the shelf small, make every rung legible, and say only what can be proven.

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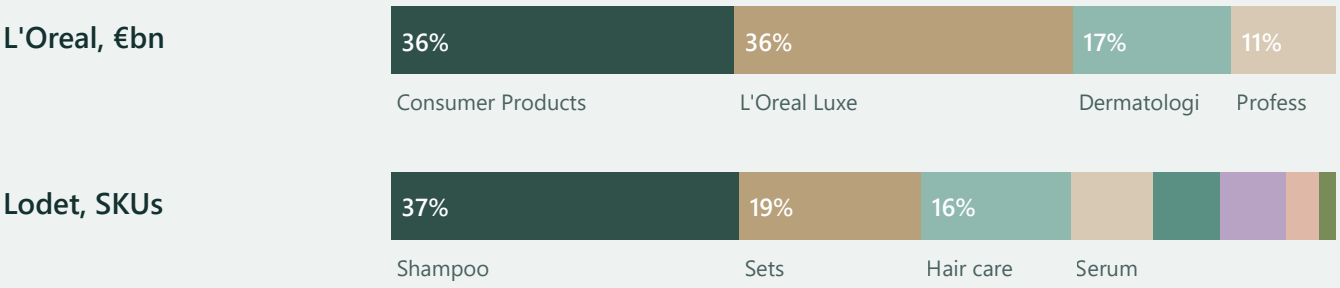
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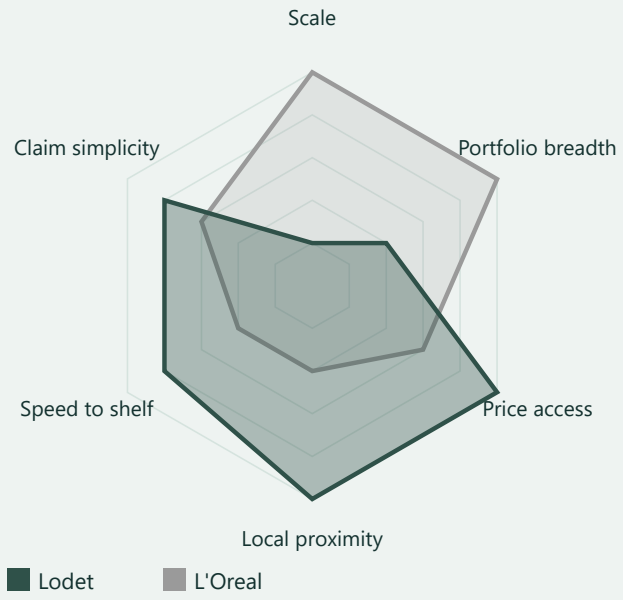
Lodet and L'Oreal, side by side

L'Oreal reported about €43.5bn of sales in 2024, 5.6% like-for-like growth and a 20% operating margin across 37 international brands. Lodet is a single Tunisian house. The comparison that matters is not size but shape.

PORTFOLIO SHAPE: L'OREAL DIVISIONS (SALES) VS LODET SHELF (PRODUCTS)



POSITIONING, 1 TO 5



Editor's assessment, not a measurement.

WHERE EACH ONE WINS

DIMENSION	LODET	L'OREAL
Scale	**One house + partner ranges**	37 brands
Entry price	**11 TND**	Mass to luxury
Language	**FR + AR, local**	Global, localised
Speed	**Weeks**	Seasons
R&D depth	**Partner formulas**	Group research
Her trust	**Neighbourhood**	Brand heritage

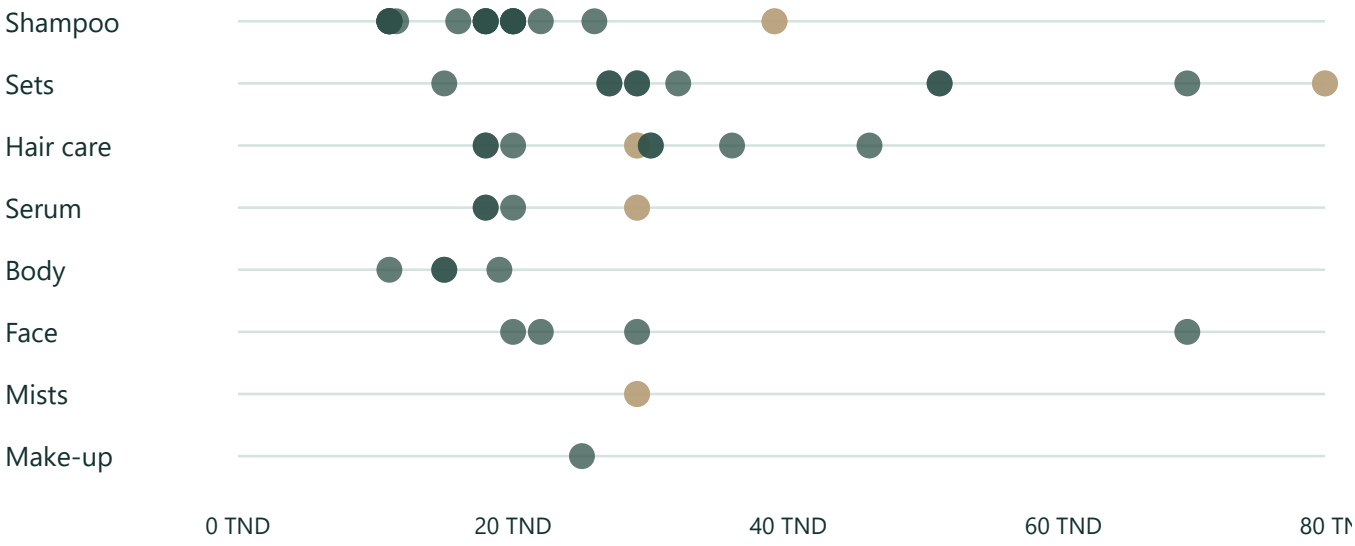
> Lodet's edge is proximity: price, language and speed. Defend those three.

03

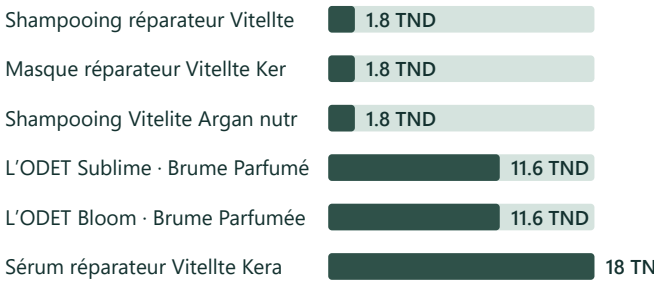
Efficiency: what each dinar buys

Every figure here is counted from the Lodet shop catalogue. Large formats make Lodet one of the cheapest ways to wash well; the house line is where brand and margin live.

EVERY PRODUCT BY PRICE (TND) · HOUSE LINE IN ACCENT



COST PER 100 ML BY FORMAT



THE AMINO HAIR RITUAL



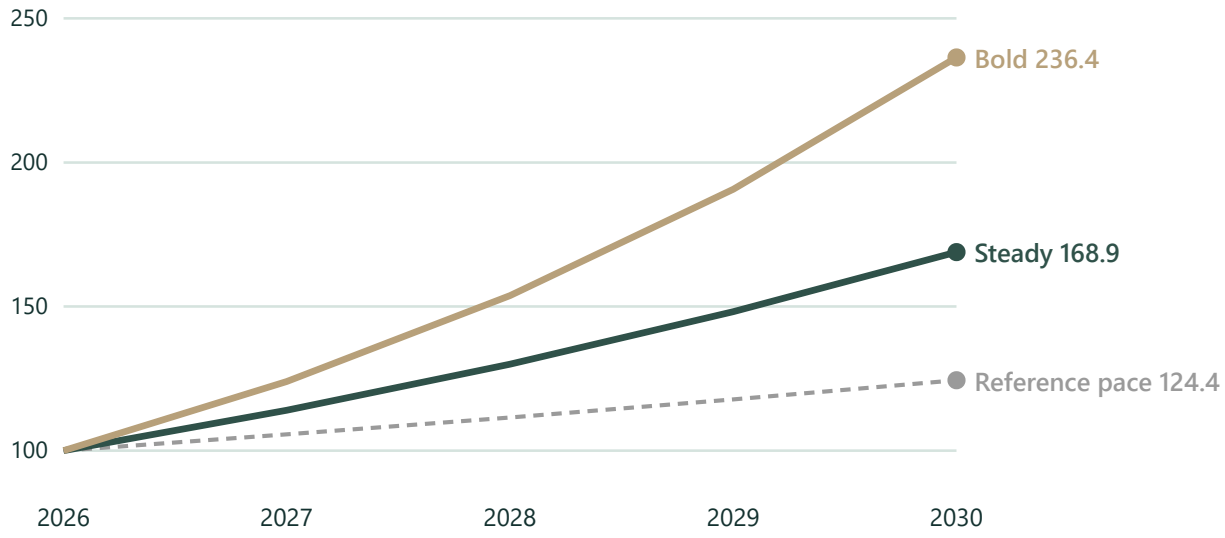
97 TND, about €29 at 3.4 TND per euro (rate assumption).

04

Growth scenarios

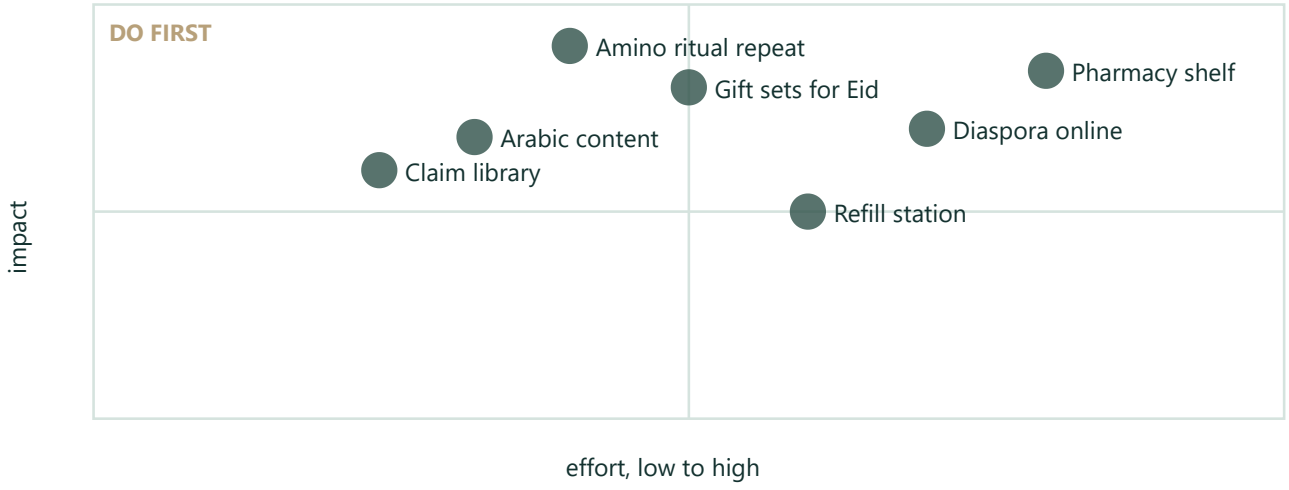
Lodet has published no revenue figure, so growth is shown as an index (2026 = 100) under three stated assumptions. These are scenarios to argue with, not forecasts.

INDEX, 2026 = 100



SCENARIO	RATE	2030	DOUBLES IN	WHAT HAS TO BE TRUE
Reference pace	5.6% a year	124.4	12.7 years	L'Oreal FY2024 like-for-like growth, used as a yardstick
Steady	14.0% a year	168.9	5.3 years	the Amino hair ritual earns repeat purchase; Eid and Women's Day gifting sets
Bold	24.0% a year	236.4	3.2 years	adds pharmacy shelves and the Tunisian diaspora online

GROWTH LEVERS: IMPACT AGAINST EFFORT



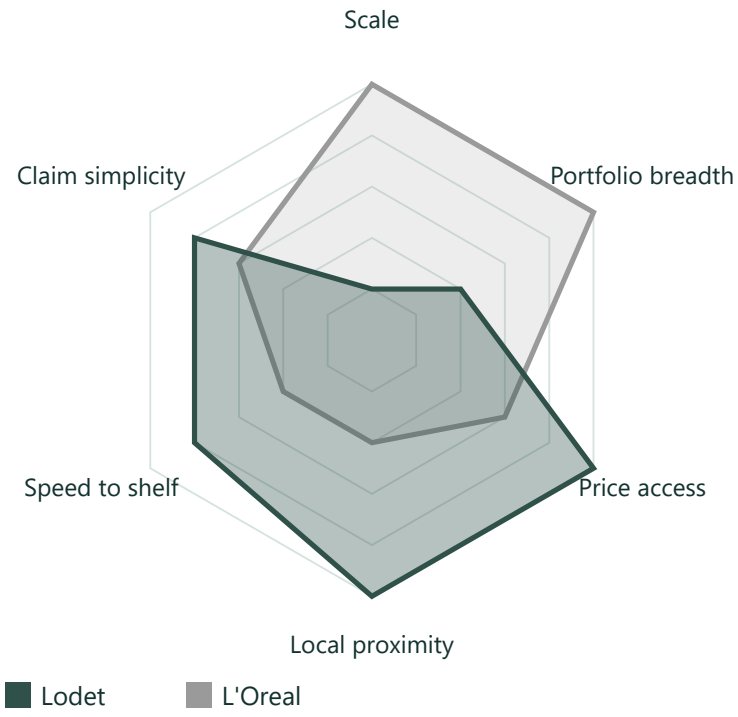
05

Market focus: Competitive Landscape

Where can a Tunisian house win against a global portfolio? The original question of this report, asked of Lodet.

AREA	STATUS	READ
Mass hair care	Crowded	L'Oreal Consumer Products leads
Local family shelf	Open	Price access + Arabic voice
Perfumed mists	Open	Gift moments, low entry price
Dermo skincare	Contested	Needs evidence before claims

PICTURE





She does not need more products. She needs the right three, explained in her language.

06

Sustainability that can be proven

From 27 September 2026 the EU bans generic environmental claims under Directive (EU) 2024/825, and cosmetic claims already answer to Regulation (EU) 655/2013. L'Oreal answers with a group programme, L'Oreal for the Future. Lodet answers with fewer bottles and plainer words.

THREE ORIGIN STORIES, ONE BRAND: THE CLAIM TO SETTLE FIRST



"Produits importés de l'Italie" · poster



"Origine Italie" · social set



"L'Odet Paris, est." · bottle

The brand story says made in Tunisia. Under 655/2013 an origin is a claim like any other: pick the true one, hold the proof, print it everywhere the same way.

PACKAGING PER LITRE

250 ml format



4 bottles per litre of product

1000 ml format



1 bottle per litre of product

KILL LIST, AND WHAT TO SAY INSTEAD

STOP	SAY INSTEAD
Clean beauty	Formulated without the ingredients listed on pack
Eco-friendly	Bottle: 1000 ml, one bottle per litre
Natural	Contains argan oil (name the % only when measured)
Green	Name the one origin printed on pack, nothing more

LODET VS L'OREAL

	LODET	L'OREAL
Proof	Formats; origin to settle	Group reporting
Exposure	Low, few claims	High, many markets
Next step	Refill pilot	Programme targets

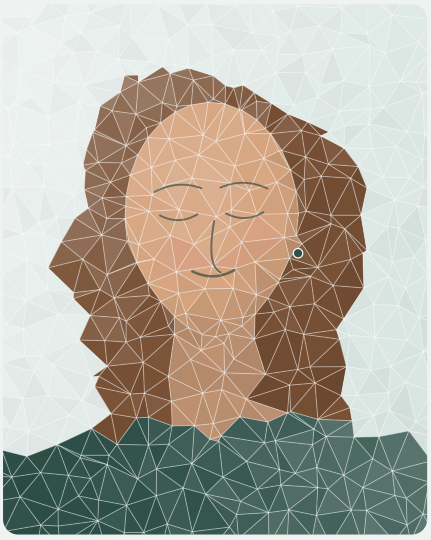
> A small brand is most credible when it claims little and proves all of it.

07

Her day, unhurried

The Lodet woman keeps her own rhythm. She is calm, careful with money and loyal to what works. The range already covers her day; the job is to tell her so.

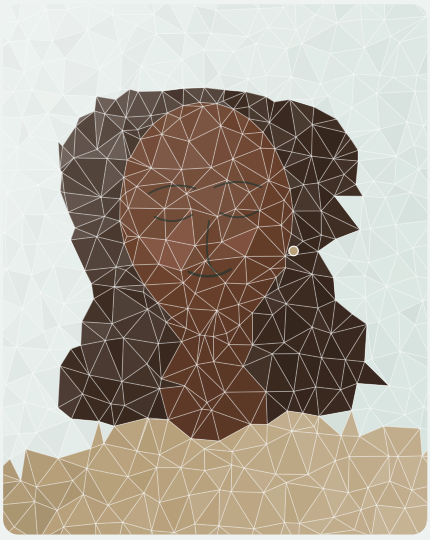
08:00	13:00	20:00	Sunday
Morning	Midday	Evening	Her hour
Bloom mist 250 ml	Venelle SPF 45	Sublime mist 250 ml	Hydra Keratin set
29 TND	29 TND	29 TND	79 TND



Salma, 31

Hair

Colour-treated hair, little time on weekdays. **Wants one ritual she trusts, not ten products.**



Ines, 42

Family

Buys for the whole bathroom shelf. **Wants honest prices and one brand for the house.**



Yasmine, 26

Mist and gifts

Self-treat, gifts for Eid and Women's Day. **Wants to feel beautiful without effort.**

Personas are composites for planning, drawn as mesh portraits; no real person is shown.

08

Decisions and basis

Each decision has one owner and a date.

#	DECISION	OWNER	BY
D1	Defend the family-shelf position in pharmacy	Commercial lead	15 Dec
D2	Test perfumed mists as the gift entry point	Brand lead	31 Jan
D3	Show every Lodet figure with its source	Brand lead	Ongoing
D4	Review these scenarios against real sales	General manager	31 Mar

BASIS

Lodet: the shop catalogue (57 products, prices in Tunisian dinars, October 2026). L'Oreal: FY2024 published results, rounded. Regulation: EU 1223/2009, EU 655/2013, Directive (EU) 2024/825.

READ WITH CARE

Growth paths are illustrative scenarios. Positioning scores are an editor's assessment. Euro values use 3.4 TND per euro. No Lodet sales, share or efficacy figure is quoted because none has been measured.

> Clean first. Soft after. Warm always.