

# Alcoholic Drinks in Morocco

June 2023

**Table of Contents** 

### Alcoholic Drinks in Morocco

### **EXECUTIVE SUMMARY**

Alcoholic drinks in 2022: The big picture

Removal of customs duties leads to massive influx of imported products

Competitive landscape

Retailing developments

On-trade vs off-trade split

What next for alcoholic drinks?

### MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Table 1 - Number of On-trade Establishments by Type 2016-2022

### TAXATION AND DUTY LEVIES

Table 2 - Taxation and Duty Levies on Alcoholic Drinks 2022

# OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

# KEY NEW PRODUCT LAUNCHES

Outlook

# MARKET INDICATORS

Table 3 - Retail Consumer Expenditure on Alcoholic Drinks 2017-2022

# MARKET DATA

- Table 4 Sales of Alcoholic Drinks by Category: Total Volume 2017-2022
- Table 5 Sales of Alcoholic Drinks by Category: Total Value 2017-2022
- Table 6 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2017-2022
- Table 7 Sales of Alcoholic Drinks by Category: % Total Value Growth 2017-2022
- Table 8 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2022
- Table 9 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2022
- Table 10 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2022
- Table 11 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2022
- Table 12 GBO Company Shares of Alcoholic Drinks: % Total Volume 2018-2022
- Table 13 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2017-2022
- Table 14 Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2022
- Table 15 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2022-2027
- Table 16 Forecast Sales of Alcoholic Drinks by Category: Total Value 2022-2027
- Table 17 Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2022-2027
- Table 18 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2022-2027

# DISCLAIMER

# SOURCES

### Summary 1 - Research Sources

# Beer in Morocco

### **KEY DATA FINDINGS**

# 2022 DEVELOPMENTS

Free trade agreements lead to influx of imported beer New consumption tax presents a challenge Local player remains dominant

# PROSPECTS AND OPPORTUNITIES

Ongoing expansion of imported beer offer

Non alcoholic beer to perform well from low base

Groupe des Brasseries du Maroc SA's leadership expected to be shaken

### CATEGORY BACKGROUND

Lager price band methodology

Summary 2 - Lager by Price Band 2022

#### CATEGORY DATA

Table 19 - Sales of Beer by Category: Total Volume 2017-2022

Table 20 - Sales of Beer by Category: Total Value 2017-2022

Table 21 - Sales of Beer by Category: % Total Volume Growth 2017-2022

Table 22 - Sales of Beer by Category: % Total Value Growth 2017-2022

Table 23 - Sales of Beer by Off-trade vs On-trade: Volume 2017-2022

Table 24 - Sales of Beer by Off-trade vs On-trade: Value 2017-2022

Table 25 - Sales of Beer by Off-trade vs On-trade: % Volume Growth 2017-2022

Table 26 - Sales of Beer by Off-trade vs On-trade: % Value Growth 2017-2022

Table 27 - Sales of Beer by Craft vs Standard 2017-2022

Table 28 - GBO Company Shares of Beer: % Total Volume 2018-2022

Table 29 - NBO Company Shares of Beer: % Total Volume 2018-2022

Table 30 - LBN Brand Shares of Beer: % Total Volume 2019-2022

Table 31 - Forecast Sales of Beer by Category: Total Volume 2022-2027

Table 32 - Forecast Sales of Beer by Category: Total Value 2022-2027

Table 33 - Forecast Sales of Beer by Category: % Total Volume Growth 2022-2027

Table 34 - Forecast Sales of Beer by Category: % Total Value Growth 2022-2027

# Rtds in Morocco

# KEY DATA FINDINGS

# 2022 DEVELOPMENTS

Limited product offer faces growing competition from flavoured vodka

Upturn in on-trade volume sales

RTDs solely comprised of imported brands

# PROSPECTS AND OPPORTUNITIES

Further decline expected

Little motivation for consumers to change habits

### CATEGORY DATA

Table 35 - Sales of RTDs by Category: Total Volume 2017-2022

Table 36 - Sales of RTDs by Category: Total Value 2017-2022

Table 37 - Sales of RTDs by Category: % Total Volume Growth 2017-2022

- Table 38 Sales of RTDs by Category: % Total Value Growth 2017-2022
- Table 39 Sales of RTDs by Off-trade vs On-trade: Volume 2017-2022
- Table 40 Sales of RTDs by Off-trade vs On-trade: Value 2017-2022
- Table 41 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 42 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 43 GBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 44 NBO Company Shares of RTDs: % Total Volume 2018-2022
- Table 45 LBN Brand Shares of RTDs: % Total Volume 2019-2022
- Table 46 Forecast Sales of RTDs by Category: Total Volume 2022-2027
- Table 47 Forecast Sales of RTDs by Category: Total Value 2022-2027
- Table 48 Forecast Sales of RTDs by Category: % Total Volume Growth 2022-2027
- Table 49 Forecast Sales of RTDs by Category: % Total Value Growth 2022-2027

# Spirits in Morocco

### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Spirits sees flat sales

Consumers trade down to lower-priced vodka and whiskies

A relatively fragmented category

### PROSPECTS AND OPPORTUNITIES

Economic conditions to sharpen consumers' focus on price

Continued demand for mahia

Vodka, gin and whiskies set to perform well

# CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology

Summary 3 - Benchmark Brands 2022

# **CATEGORY DATA**

- Table 50 Sales of Spirits by Category: Total Volume 2017-2022
- Table 51 Sales of Spirits by Category: Total Value 2017-2022
- Table 52 Sales of Spirits by Category: % Total Volume Growth 2017-2022
- Table 53 Sales of Spirits by Category: % Total Value Growth 2017-2022
- Table 54 Sales of Spirits by Off-trade vs On-trade: Volume 2017-2022
- Table 55 Sales of Spirits by Off-trade vs On-trade: Value 2017-2022
- Table 56 Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 57 Sales of Spirits by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 58 Sales of White Rum by Price Platform: % Total Volume 2017-2022
- Table 59 Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2017-2022
- Table 60 Sales of English Gin by Price Platform: % Total Volume 2017-2022
- Table 61 Sales of Vodka by Price Platform: % Total Volume 2017-2022
- Table 62 Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2017-2022
- Table 63 GBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 64 NBO Company Shares of Spirits: % Total Volume 2018-2022
- Table 65 LBN Brand Shares of Spirits: % Total Volume 2019-2022
- Table 66 Forecast Sales of Spirits by Category: Total Volume 2022-2027
- Table 67 Forecast Sales of Spirits by Category: Total Value 2022-2027
- Table 68 Forecast Sales of Spirits by Category: % Total Volume Growth 2022-2027
- Table 69 Forecast Sales of Spirits by Category: % Total Value Growth 2022-2027

#### Wine in Morocco

### **KEY DATA FINDINGS**

#### 2022 DEVELOPMENTS

Still red wine still the most popular and a key sales driver of wine

New alcohol-free varieties, but sparkling wine and fortified wine perform poorly

Les Celliers de Meknes remains the largest player

# PROSPECTS AND OPPORTUNITIES

More new entrants expected

Economic conditions likely to help to maintain importance of still red wine

Further challenges ahead for sparkling wine and fortified wine

### **CATEGORY DATA**

- Table 70 Sales of Wine by Category: Total Volume 2017-2022
- Table 71 Sales of Wine by Category: Total Value 2017-2022
- Table 72 Sales of Wine by Category: % Total Volume Growth 2017-2022
- Table 73 Sales of Wine by Category: % Total Value Growth 2017-2022
- Table 74 Sales of Wine by Off-trade vs On-trade: Volume 2017-2022
- Table 75 Sales of Wine by Off-trade vs On-trade: Value 2017-2022
- Table 76 Sales of Wine by Off-trade vs On-trade: % Volume Growth 2017-2022
- Table 77 Sales of Wine by Off-trade vs On-trade: % Value Growth 2017-2022
- Table 78 Sales of Still Red Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 79 Sales of Still Rosé Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 80 Sales of Still White Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 81 Sales of Other Sparkling Wine by Price Segment: % Off-trade Volume 2017-2022
- Table 82 GBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 83 NBO Company Shares of Still Light Grape Wine: % Total Volume 2018-2022
- Table 84 LBN Brand Shares of Still Light Grape Wine: % Total Volume 2019-2022
- Table 85 GBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 86 NBO Company Shares of Champagne: % Total Volume 2018-2022
- Table 87 LBN Brand Shares of Champagne: % Total Volume 2019-2022
- Table 88 GBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 89 NBO Company Shares of Other Sparkling Wine: % Total Volume 2018-2022
- Table 90 LBN Brand Shares of Other Sparkling Wine: % Total Volume 2019-2022
- Table 91 GBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 92 NBO Company Shares of Fortified Wine and Vermouth: % Total Volume 2018-2022
- Table 93 LBN Brand Shares of Fortified Wine and Vermouth: % Total Volume 2019-2022
- Table 94 Forecast Sales of Wine by Category: Total Volume 2022-2027
- Table 95 Forecast Sales of Wine by Category: Total Value 2022-2027
- Table 96 Forecast Sales of Wine by Category: % Total Volume Growth 2022-2027
- Table 97 Forecast Sales of Wine by Category: % Total Value Growth 2022-2027

# 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/alcoholic-drinks-in-morocco/report.