

Retail in Morocco

February 2024

Table of Contents

EXECUTIVE SUMMARY

Retail in 2023: The big picture

Marjane Group expands digital footprint with marketplace launch, anticipates 20% turnover increase

Finance law bolsters local market with increased duties on imported textile brands

What next for retail?

OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2023

Seasonality

Black Friday

Chaabane

Ramadan

Eid kbir

Summer

Back to School

MARKET DATA

Table 1 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 2 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 3 - Sales in Retail Offline by Channel: Value 2018-2023

Table 4 - Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 5 - Retail Offline Outlets by Channel: Units 2018-2023

Table 6 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 7 - Sales in Retail E-Commerce by Product: Value 2018-2023

Table 8 - Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 9 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 10 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 11 - Sales in Grocery Retailers by Channel: Value 2018-2023

Table 12 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 13 - Grocery Retailers Outlets by Channel: Units 2018-2023

Table 14 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 15 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 16 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 17 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 18 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 19 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 20 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 21 - Retail GBO Company Shares: % Value 2019-2023

Table 22 - Retail GBN Brand Shares: % Value 2020-2023

Table 23 - Retail Offline GBO Company Shares: % Value 2019-2023

Table 24 - Retail Offline GBN Brand Shares: % Value 2020-2023

Table 25 - Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 26 - Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 27 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 28 - Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 29 - Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 30 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 31 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 32 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 33 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 34 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 35 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 36 - Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 37 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 38 - Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 39 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 40 - Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 41 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 42 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 43 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 44 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 45 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 46 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 47 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 48 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 49 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 50 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 51 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 52 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 53 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Convenience Retailers in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Diversification strategies in response to intensifying competition

Sustainability initiatives drive consumer engagement and brand loyalty

Digital transformation reshape retail operations and customer engagement

PROSPECTS AND OPPORTUNITIES

Expansion of chained outlets: Closing the convenience gap

Government support and intensified competition

Infrastructure development and growth of forecourt retailers

CHANNEL DATA

Table 54 - Convenience Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 55 - Convenience Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 56 - Sales in Convenience Retailers by Channel: Value 2018-2023

Table 57 - Sales in Convenience Retailers by Channel: % Value Growth 2018-2023

Table 58 - Convenience Retailers GBO Company Shares: % Value 2019-2023

Table 59 - Convenience Retailers GBN Brand Shares: % Value 2020-2023

Table 60 - Convenience Retailers LBN Brand Shares: Outlets 2020-2023

Table 61 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 62 - Convenience Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 63 - Forecast Sales in Convenience Retailers by Channel: Value 2023-2028

Table 64 - Forecast Sales in Convenience Retailers by Channel: % Value Growth 2023-2028

Supermarkets in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Price sensitivity, traditional customs, and shifting trends

Shifts in consumer preferences

Dominance of Carrefour Market and Marjane Market

PROSPECTS AND OPPORTUNITIES

Urbanisation fuels channel growth

Premiumisation and digitalisation drive competitiveness

Converting traditional grocers and navigating discounter expansion

CHANNEL DATA

Table 65 - Supermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 66 - Supermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 67 - Supermarkets GBO Company Shares: % Value 2019-2023

Table 68 - Supermarkets GBN Brand Shares: % Value 2020-2023

Table 69 - Supermarkets LBN Brand Shares: Outlets 2020-2023

Table 70 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 71 - Supermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Hypermarkets in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Marjane's benchmark success

Label'Vie's aggressive expansion strategy

Innovations in hypermarket concepts

PROSPECTS AND OPPORTUNITIES

Expansion driven by shopping centre growth

Sustainability as a competitive differentiator

Accelerated shift towards omnichannel models

CHANNEL DATA

Table 72 - Hypermarkets: Value Sales, Outlets and Selling Space 2018-2023

Table 73 - Hypermarkets: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 74 - Hypermarkets GBO Company Shares: % Value 2019-2023

Table 75 - Hypermarkets GBN Brand Shares: % Value 2020-2023

Table 76 - Hypermarkets LBN Brand Shares: Outlets 2020-2023

Table 77 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 78 - Hypermarkets Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Discounters in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Enhanced value propositions amid economic constraints

Strategic expansion and adaptation of leading players

Strengthening brand image and community engagement

PROSPECTS AND OPPORTUNITIES

Dominance of discounters in modern grocery retailers
BIM's continued leadership amidst challenges
Digitalisation: Transforming the discounters landscape

CHANNEL DATA

Table 79 - Discounters: Value Sales, Outlets and Selling Space 2018-2023
Table 80 - Discounters: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 81 - Discounters GBO Company Shares: % Value 2019-2023
Table 82 - Discounters GBN Brand Shares: % Value 2020-2023
Table 83 - Discounters LBN Brand Shares: Outlets 2020-2023
Table 84 - Discounters Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 85 - Discounters Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Small Local Grocers in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Government-led support initiatives strengthen small business resilience
Tech-driven innovations revolutionise small grocers' operations
Shift towards digital payment adoption and hygienic practices

PROSPECTS AND OPPORTUNITIES

Continued dominance of small-scale retailers in the grocery landscape
Accelerated digital transformation revolutionises operations
Sustained government support bolsters modernisation efforts

CHANNEL DATA

Table 86 - Small Local Grocers: Value Sales, Outlets and Selling Space 2018-2023
Table 87 - Small Local Grocers: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 88 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 89 - Small Local Grocers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

General Merchandise Stores in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Strengthening local production and job creation initiatives
Evolution and diversification in furniture retail
Balancing traditional retail with digital disruption

PROSPECTS AND OPPORTUNITIES

Government support drives local production expansion
Rise of international brands reshaping retail dynamics
Digitalisation revolutionises general merchandise retail

CHANNEL DATA

Table 90 - General Merchandise Stores: Value Sales, Outlets and Selling Space 2018-2023
Table 91 - General Merchandise Stores: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 92 - Sales in General Merchandise Stores by Channel: Value 2018-2023
Table 93 - Sales in General Merchandise Stores by Channel: % Value Growth 2018-2023
Table 94 - General Merchandise Stores GBO Company Shares: % Value 2019-2023

Table 95 - General Merchandise Stores GBN Brand Shares: % Value 2020-2023

Table 96 - General Merchandise Stores LBN Brand Shares: Outlets 2020-2023

Table 97 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 98 - General Merchandise Stores Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 99 - Forecast Sales in General Merchandise Stores by Channel: Value 2023-2028

Table 100 - Forecast Sales in General Merchandise Stores by Channel: % Value Growth 2023-2028

Apparel and Footwear Specialists in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Decathlon's impactful role in democratising access

Impact of border closures on traditional circuits

The category remains highly fragmented, led by Defacto and LC Waikiki

PROSPECTS AND OPPORTUNITIES

Economic recovery to drive expansion

Fragmentation and competition

Rise of omnichannel players

CHANNEL DATA

Table 101 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 102 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 103 - Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 104 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 105 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 106 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 107 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Appliances and Electronics Specialists in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Market dynamics shift amidst economic challenges

Role of salespersons in purchasing decisions remains paramount

Comptoir Métallurgique Marocain retains the lead while entry of Haier marks premium product surge

PROSPECTS AND OPPORTUNITIES

Consumer preference shifts towards premium and technological products

Digitalisation drives omni-channel retailing

Proximity, price sensitivity, and digitalisation shape competitive landscape

CHANNEL DATA

Table 108 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 109 - Appliances and Electronics Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 110 - Appliances and Electronics Specialists GBO Company Shares: % Value 2019-2023

Table 111 - Appliances and Electronics Specialists GBN Brand Shares: % Value 2020-2023

Table 112 - Appliances and Electronics Specialists LBN Brand Shares: Outlets 2020-2023

Table 113 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 114 - Appliances and Electronics Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Home Products Specialists in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Modern fusion design and accessible luxury
Shift towards domestic manufacturing and formalisation
Consolidation and adaptation in retail landscape

PROSPECTS AND OPPORTUNITIES

Revitalising the informal sector with online platforms
Innovative store concepts redefining retail experience
Embracing local sourcing and chained store expansion

CHANNEL DATA

Table 115 - Home Products Specialists: Value Sales, Outlets and Selling Space 2018-2023
Table 116 - Home Products Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 117 - Sales in Home Products Specialists by Channel: Value 2018-2023
Table 118 - Sales in Home Products Specialists by Channel: % Value Growth 2018-2023
Table 119 - Home Products Specialists GBO Company Shares: % Value 2019-2023
Table 120 - Home Products Specialists GBN Brand Shares: % Value 2020-2023
Table 121 - Home Products Specialists LBN Brand Shares: Outlets 2020-2023
Table 122 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 123 - Home Products Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 124 - Forecast Sales in Home Products Specialists by Channel: Value 2023-2028
Table 125 - Forecast Sales in Home Products Specialists by Channel: % Value Growth 2023-2028

Health and Beauty Specialists in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shift towards cost-effective options through wholesalers
Preference for 'Made in France' dermo-cosmetic products and gender-driven demand surge
Regulatory challenges and market dynamics

PROSPECTS AND OPPORTUNITIES

Demand surge driven by natural ingredients and wellness tourism
Regulatory reforms energise pharmacies and supplement sales
Bio-cosmetics boom and digital expansion propel market dynamics

CHANNEL DATA

Table 126 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space 2018-2023
Table 127 - Health and Beauty Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023
Table 128 - Sales in Health and Beauty Specialists by Channel: Value 2018-2023
Table 129 - Sales in Health and Beauty Specialists by Channel: % Value Growth 2018-2023
Table 130 - Health and Beauty Specialists GBO Company Shares: % Value 2019-2023
Table 131 - Health and Beauty Specialists GBN Brand Shares: % Value 2020-2023
Table 132 - Health and Beauty Specialists LBN Brand Shares: Outlets 2020-2023
Table 133 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028
Table 134 - Health and Beauty Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028
Table 135 - Forecast Sales in Health and Beauty Specialists by Channel: Value 2023-2028
Table 136 - Forecast Sales in Health and Beauty Specialists by Channel: % Value Growth 2023-2028

Vending in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Challenges persist: Vending struggles amid lingering pandemic effects
Beverage dominance persists: Market dynamics in 2023
Emerging Threats: Coffee Bike's Disruptive Potential

PROSPECTS AND OPPORTUNITIES

Steady growth trajectory: Unlocking potential in vending
Targeting niche markets: Expanding vending reach
Embracing digitalisation: Cashless vending takes centre stage

CHANNEL DATA

Table 137 - Vending by Product: Value 2018-2023
Table 138 - Vending by Product: % Value Growth 2018-2023
Table 139 - Vending GBO Company Shares: % Value 2019-2023
Table 140 - Vending GBN Brand Shares: % Value 2020-2023
Table 141 - Vending Forecasts by Product: Value 2023-2028
Table 142 - Vending Forecasts by Product: % Value Growth 2023-2028

[Direct Selling in Morocco](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

Post-pandemic resurgence and economic realities
Strategic adaptation and market leadership
Digital transformation and competitive pressures

PROSPECTS AND OPPORTUNITIES

Beauty and wellness resurgence post-pandemic
Global dominance and expansion into smaller urban markets
Digital transformation as the new norm

CHANNEL DATA

Table 143 - Direct Selling by Product: Value 2018-2023
Table 144 - Direct Selling by Product: % Value Growth 2018-2023
Table 145 - Direct Selling GBO Company Shares: % Value 2019-2023
Table 146 - Direct Selling GBN Brand Shares: % Value 2020-2023
Table 147 - Direct Selling Forecasts by Product: Value 2023-2028
Table 148 - Direct Selling Forecasts by Product: % Value Growth 2023-2028

[Retail E-Commerce in Morocco](#)

KEY DATA FINDINGS

2023 DEVELOPMENTS

E-commerce growth momentum
Regulatory adjustments and market dynamics
Diversification and innovation in retail strategies

PROSPECTS AND OPPORTUNITIES

Regulatory framework development and government initiatives
Intensified competition and market evolution
Challenges and opportunities in foods e-commerce

CHANNEL DATA

Table 149 - Retail E-Commerce by Channel: Value 2017-2022

Table 150 - Retail E-Commerce by Channel: % Value Growth 2017-2022

Table 151 - Retail E-Commerce by Product: Value 2017-2022

Table 152 - Retail E-Commerce by Product: % Value Growth 2017-2022

Table 153 - Retail E-Commerce GBO Company Shares: % Value 2018-2022

Table 154 - Retail E-Commerce GBN Brand Shares: % Value 2019-2022

Table 155 - Forecast Retail E-Commerce by Channel: Value 2022-2027

Table 156 - Forecast Retail E-Commerce by Channel: % Value Growth 2022-2027

Table 157 - Forecast Retail E-Commerce by Product: Value 2022-2027

Table 158 - Forecast Retail E-Commerce by Product: % 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/retail-in-morocco/report.