

Tobacco in Morocco

June 2023

Table of Contents

Tobacco in Morocco

EXECUTIVE SUMMARY

Tobacco in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for tobacco?

OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 1 - Legislation Summary at a Glance

Minimum legal smoking age

Smoking prevalence

Tar levels

Health warnings

Plain packaging

Advertising and sponsorship

Point-of-sale display bans

Smoking in public places

Flavoured tobacco product ban

Vapour products

PRODUCTION/IMPORTS/EXPORTS

MARKET INDICATORS

Table 1 - Number of Adult Smokers by Gender 2017-2022

MARKET DATA

Table 2 - Sales of Tobacco by Category: Volume 2017-2022

Table 3 - Sales of Tobacco by Category: Value 2017-2022

Table 4 - Sales of Tobacco by Category: % Volume Growth 2017-2022

Table 5 - Sales of Tobacco by Category: % Value Growth 2017-2022

Table 6 - Forecast Sales of Tobacco by Category: Volume 2022-2027

Table 7 - Forecast Sales of Tobacco by Category: Value 2022-2027

Table 8 - Forecast Sales of Tobacco by Category: % Volume Growth 2022-2027

Table 9 - Forecast Sales of Tobacco by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 2 - Research Sources

Cigarettes in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Volume sales impacted by price increases and declining disposable incomes

Switch to illicit trade further impacts volume sales

Société Marocaines des Tabacs maintains its strong lead in 2022

PROSPECTS AND OPPORTUNITIES

Further tax increases expected to impact future growth

Rising demand for illicit cigarettes, which are far cheaper and often perceived to be of higher quality Expansion of alternative tobacco products will further impact demand for retail cigarettes

TAXATION AND PRICING

Taxation rates

Table 10 - Taxation and Duty Levies 2017-2022

Average cigarette pack price breakdown

Summary 3 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

- Table 11 Sales of Cigarettes: Volume 2017-2022
- Table 12 Sales of Cigarettes by Category: Value 2017-2022
- Table 13 Sales of Cigarettes: % Volume Growth 2017-2022
- Table 14 Sales of Cigarettes by Category: % Value Growth 2017-2022
- Table 15 Sales of Cigarettes by Blend: % Volume 2017-2022
- Table 16 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2017-2022
- Table 17 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2017-2022
- Table 18 Sales of Cigarettes by Pack Size: % Volume 2017-2022
- Table 19 Sales of Cigarettes by Price Band: % Volume 2017-2022
- Table 20 NBO Company Shares of Cigarettes: % Volume 2018-2022
- Table 21 LBN Brand Shares of Cigarettes: % Volume 2019-2022
- Table 22 Sales of Cigarettes by Distribution Format: % Volume 2017-2022
- Table 23 Illicit Trade Estimate of Cigarettes: Volume 2017-2022
- Table 24 Forecast Sales of Cigarettes: Volume 2022-2027
- Table 25 Forecast Sales of Cigarettes by Category: Value 2022-2027
- Table 26 Forecast Sales of Cigarettes: % Volume Growth 2022-2027
- Table 27 Forecast Sales of Cigarettes by Category: % Value Growth 2022-2027
- Table 28 Forecast Sales of Cigarettes by Blend: % Volume 2022-2027
- Table 29 Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2022-2027
- Table 30 Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2022-2027
- Table 31 Forecast Sales of Cigarettes by Pack Size: % Volume 2022-2027
- Table 32 Forecast Sales of Cigarettes by Price Band: % Volume 2022-2027

Cigars, Cigarillos and Smoking Tobacco in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sales rebound with the reopening of cafés and bars, and recovery of tourism

High prices of pipe tobacco encourage consumers to switch to illicit trade

While Société Marocaines des Tabacs leads cigars, North Africa Tobacco dominates smoking tobacco

PROSPECTS AND OPPORTUNITIES

Increasing number of tourists and expansion of modern retail and cigar stores will support growth

Positive future for pipe tobacco following lifting of ban

Limited entry opportunities for new players as Société Marocaines des Tabacs and North Africa Tobacco will maintain their dominance

CATEGORY DATA

- Table 33 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2017-2022
- Table 34 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2017-2022
- Table 35 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2017-2022
- Table 36 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2017-2022
- Table 37 Sales of Cigars by Size: % Volume 2017-2022
- Table 38 NBO Company Shares of Cigars and Cigarillos: % Volume 2018-2022

- Table 39 LBN Brand Shares of Cigars and Cigarillos: % Volume 2019-2022
- Table 40 NBO Company Shares of Cigars: % Volume 2018-2022
- Table 41 LBN Brand Shares of Cigars: % Volume 2019-2022
- Table 42 NBO Company Shares of Smoking Tobacco: % Volume 2018-2022
- Table 43 LBN Brand Shares of Smoking Tobacco: % Volume 2019-2022
- Table 44 NBO Company Shares of Pipe Tobacco: % Volume 2018-2022
- Table 45 LBN Brand Shares of Pipe Tobacco: % Volume 2019-2022
- Table 46 Distribution of Cigars and Cigarillos by Format: % Volume 2017-2022
- Table 47 Distribution of Smoking Tobacco by Format: % Volume 2017-2022
- Table 48 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2022-2027
- Table 49 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2022-2027
- Table 50 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2022-2027
- Table 51 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2022-2027

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Philip Morris continues to invest in its own stores

Increasing availability and entrance of more affordable products drives growth of e-vapour products

E-commerce is the dominant channel in a highly fragmented competitive landscape in 2022

PROSPECTS AND OPPORTUNITIES

Entry of more products in different formats and flavours set to support growth of increasingly fashionable e-vapour products

Targeting a wider consumer base is key to developing the category

Threat of illicit trade following tax increases

CATEGORY INDICATORS

Table 52 - Number of Adult Vapers 2017-2022

CATEGORY DATA

- Table 53 Sales of Tobacco Heating Devices: Volume 2017-2022
- Table 54 Sales of Tobacco Heating Devices: % Volume Growth 2017-2022
- Table 55 Sales of Heated Tobacco: Volume 2017-2022
- Table 56 Sales of Heated Tobacco: % Volume Growth 2017-2022
- Table 57 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2017-2022
- Table 58 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2017-2022
- Table 59 Sales of E-Liquids by Nicotine Strength: % Value 2019-2022
- Table 60 NBO Company Shares of E-Vapour Products: % Value 2018-2022
- Table 61 LBN Brand Shares of E-Vapour Products: % Value 2019-2022
- Table 62 NBO Company Shares of Tobacco Heating Devices: % Volume 2018-2022
- Table 63 LBN Brand Shares of Tobacco Heating Devices: % Volume 2019-2022
- Table 64 NBO Company Shares of Heated Tobacco: % Volume 2018-2022
- Table 65 LBN Brand Shares of Heated Tobacco: % Volume 2019-2022
- Table 66 Distribution of E-Vapour Products by Format: % Value 2017-2022
- Table 67 Forecast Sales of Heated Tobacco: Volume 2022-2027
- Table 68 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2022-2027
- Table 69 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % 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/tobacco-in-morocco/report.