

Cooking Ingredients and Meals in Morocco

November 2022

Table of Contents

Cooking Ingredients and Meals in Morocco

EXECUTIVE SUMMARY

Cooking ingredients and meals in 2022: The big picture

Key trends in 2022

Competitive landscape

Channel developments

What next for cooking ingredients and meals?

MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2017-2022

Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2017-2022

Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2017-2022

Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2017-2022

Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2018-2022

Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2019-2022

Table 7 - Distribution of Cooking Ingredients and Meals by Format: % Value 2017-2022

Table 8 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2022-2027

Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2022-2027

Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2022-2027

Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Edible oils suffers strong price fluctuations due to high reliance on imports

Good olive oil harvest negatively impacts packaged olive oil sales

Companies adapt to high materials prices by reducing pack sizes and introducing combination edible oils products

PROSPECTS AND OPPORTUNITIES

Mixed prospects for vegetable oil with return of tourism only somewhat set to combat rising prices and unhealthy perception

Moroccan government announces import duty changes and oil seed production targets to combat industry price hikes

Unpackaged oil and soaring costs to threaten sales of packaged edible oils

CATEGORY DATA

Table 12 - Sales of Edible Oils by Category: Volume 2017-2022

Table 13 - Sales of Edible Oils by Category: Value 2017-2022

Table 14 - Sales of Edible Oils by Category: % Volume Growth 2017-2022

Table 15 - Sales of Edible Oils by Category: % Value Growth 2017-2022

Table 16 - NBO Company Shares of Edible Oils: % Value 2018-2022

Table 17 - LBN Brand Shares of Edible Oils: % Value 2019-2022

Table 18 - Distribution of Edible Oils by Format: % Value 2017-2022

Table 19 - Forecast Sales of Edible Oils by Category: Volume 2022-2027

Table 20 - Forecast Sales of Edible Oils by Category: Value 2022-2027

Table 21 - Forecast Sales of Edible Oils by Category: % Volume Growth 2022-2027

Table 22 - Forecast Sales of Edible Oils by Category: % Value Growth 2022-2027

Meals and Soups in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Economic downturn damages volume sales in ready meals and soup and limits investment in new product development

Frozen ready meals see strongest performance to drive overall value sales growth

Sales of soup remain small, seasonal and limited to upper-income consumers

PROSPECTS AND OPPORTUNITIES

Low disposable incomes will continue to restrict category sales prospects

Manufacturers need to invest in marketing to convince consumers that packaged soup is a convenient and healthy meal solution

Low customer awareness and price hinder the growth of ready meals

CATEGORY DATA

Table 23 - Sales of Meals and Soups by Category: Volume 2017-2022

Table 24 - Sales of Meals and Soups by Category: Value 2017-2022

Table 25 - Sales of Meals and Soups by Category: % Volume Growth 2017-2022

Table 26 - Sales of Meals and Soups by Category: % Value Growth 2017-2022

Table 27 - Sales of Frozen Ready Meals by Ethnicity: % Value 2017-2022

Table 28 - NBO Company Shares of Meals and Soups: % Value 2018-2022

Table 29 - LBN Brand Shares of Meals and Soups: % Value 2019-2022

Table 30 - Distribution of Meals and Soups by Format: % Value 2017-2022

Table 31 - Forecast Sales of Meals and Soups by Category: Volume 2022-2027

Table 32 - Forecast Sales of Meals and Soups by Category: Value 2022-2027

Table 33 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2022-2027

Table 34 - Forecast Sales of Meals and Soups by Category: % Value Growth 2022-2027

Sauces, Dips and Condiments in Morocco

KEY DATA FINDINGS

2022 DEVELOPMENTS

Rising economic uncertainty thwarts further growth in volume sales

Mayonnaise see fastest value growth though all-purpose mixes are on the rise

Les Conserves de Meknès Aïcha's Aïcha brand remains dominant in tomato pastes and purées

PROSPECTS AND OPPORTUNITIES

Economic downturn will continue to be felt over the forecast period

Introduction of smaller pack sizes expected to help players sustain volume sales

Product differentiation will remain a key strategy in table sauces

CATEGORY DATA

Table 35 - Sales of Sauces, Dips and Condiments by Category: Volume 2017-2022

Table 36 - Sales of Sauces, Dips and Condiments by Category: Value 2017-2022

Table 37 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2017-2022

Table 38 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2017-2022

Table 39 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2018-2022

Table 40 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2019-2022

Table 41 - Distribution of Sauces, Dips and Condiments by Format: % Value 2017-2022

Table 42 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2022-2027

Table 43 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2022-2027

Table 44 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2022-2027

Table 45 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS

Sweet spreads see slowdown in volume growth due to maturity and health concerns

Honey drives volume sales thanks to health benefits with nut and seed based spreads benefitting from new interest in packaged amlou

Standard and private label brands dominate overall category though Nutella makes gains chocolate spreads

PROSPECTS AND OPPORTUNITIES

Honey's healthy positioning will help it to overtake jams and preserves to become Morocco's most popular sweet spread

Under ongoing economic difficulties, price increases are likely to be as restrained

Good growth opportunities for nut and seed based spreads, though affordability remains an issue

CATEGORY DATA

Table 46 - Sales of Sweet Spreads by Category: Volume 2017-2022

Table 47 - Sales of Sweet Spreads by Category: Value 2017-2022

Table 48 - Sales of Sweet Spreads by Category: % Volume Growth 2017-2022

Table 49 - Sales of Sweet Spreads by Category: % Value Growth 2017-2022

Table 50 - NBO Company Shares of Sweet Spreads: % Value 2018-2022

Table 51 - LBN Brand Shares of Sweet Spreads: % Value 2019-2022

Table 52 - Distribution of Sweet Spreads by Format: % Value 2017-2022

Table 53 - Forecast Sales of Sweet Spreads by Category: Volume 2022-2027

Table 54 - Forecast Sales of Sweet Spreads by Category: Value 2022-2027

Table 55 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2022-2027

Table 56 - Forecast Sales of Sweet Spreads 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/cooking-ingredients-and-meals-in-morocco/report.