

# Health and Wellness in Morocco

February 2022

Table of Contents

## EXECUTIVE SUMMARY

Health and wellness in 2021: The big picture

2021 key trends

Competitive landscape

Retailing developments

What next for health and wellness?

## MARKET DATA

Table 1 - Sales of Health and Wellness by Type: Value 2016-2021

Table 2 - Sales of Health and Wellness by Type: % Value Growth 2016-2021

Table 3 - Sales of Health and Wellness by Category: Value 2016-2021

Table 4 - Sales of Health and Wellness by Category: % Value Growth 2016-2021

Table 5 - Sales of Health and Wellness by Prime Positioning: Value 2016-2021

Table 6 - Sales of Health and Wellness by Prime Positioning: % Value Growth 2016-2021

Table 7 - NBO Company Shares of Health and Wellness: % Value 2017-2021

Table 8 - LBN Brand Shares of Health and Wellness: % Value 2018-2021

Table 9 - Distribution of Health and Wellness by Format: % Value 2016-2021

Table 10 - Distribution of Health and Wellness by Format and Category: % Value 2021

Table 11 - Forecast Sales of Health and Wellness by Type: Value 2021-2026

Table 12 - Forecast Sales of Health and Wellness by Type: % Value Growth 2021-2026

Table 13 - Forecast Sales of Health and Wellness by Category: Value 2021-2026

Table 14 - Forecast Sales of Health and Wellness by Category: % Value Growth 2021-2026

Table 15 - Forecast Sales of Health and Wellness by Prime Positioning: Value 2021-2026

Table 16 - Forecast Sales of Health and Wellness by Prime Positioning: % Value Growth 2021-2026

## DISCLAIMER

## SOURCES

Summary 1 - Research Sources

## Better For You Beverages in Morocco

## KEY DATA FINDINGS

### 2021 DEVELOPMENTS

Contraction for BFY beverages as consumers avoid products with artificial ingredients

BFY reduced caffeine beverages remains a small category due to lack of consumer interest

Coco-Cola Morocco continues to lead BFY beverages in 2021

### PROSPECTS AND OPPORTUNITIES

BFY beverages recovers while BFY reduced sugar beverages maintains downward trend

Ongoing contraction for BFY reduced sugar beverages due to health concerns over artificial ingredients

BFY reduced caffeine beverages continues to perform well, however the coffee landscape is unpredictable

## CATEGORY DATA

Table 17 - Sales of BFY Beverages by Category: Value 2016-2021

Table 18 - Sales of BFY Beverages by Category: % Value Growth 2016-2021

Table 19 - NBO Company Shares of BFY Beverages: % Value 2017-2021

Table 20 - LBN Brand Shares of BFY Beverages: % Value 2018-2021

Table 21 - Distribution of BFY Beverages by Format: % Value 2016-2021

Table 22 - Forecast Sales of BFY Beverages by Category: Value 2021-2026

Table 23 - Forecast Sales of BFY Beverages by Category: % Value Growth 2021-2026

## Better For You Packaged Food in Morocco

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

BFY reduced sugar products face competition from substitute products due to the economic constraints COVID-19 has placed on household budgets  
Industry players in butter and spreads launch reduced fat variants as consumers turn to BFY packaged foods  
Fromageries Bel continues to lead in 2021 but private label sees strong development

#### PROSPECTS AND OPPORTUNITIES

Demand for better for you packaged food registers strong growth over the forecast period  
Dairy products achieve strong growth in BFY packaged food over the forecast period  
E-commerce gathers pace in line with consumer trust in this channel

#### CATEGORY DATA

Table 24 - Sales of BFY Packaged Food by Category: Value 2016-2021  
Table 25 - Sales of BFY Packaged Food by Category: % Value Growth 2016-2021  
Table 26 - NBO Company Shares of BFY Packaged Food: % Value 2017-2021  
Table 27 - LBN Brand Shares of BFY Packaged Food: % Value 2018-2021  
Table 28 - Distribution of BFY Packaged Food by Format: % Value 2016-2021  
Table 29 - Forecast Sales of BFY Packaged Food by Category: Value 2021-2026  
Table 30 - Forecast Sales of BFY Packaged Food by Category: % Value Growth 2021-2026

## Fortified/Functional Beverages in Morocco

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

FF beverages remains a small and underdeveloped category in Morocco  
Small category characterised by two players and high prices  
FF chocolate-based flavoured powder drinks grows in demand in response to the closure of schools

#### PROSPECTS AND OPPORTUNITIES

A slow return to normality benefits FF beverages though FF soft drinks sales dampened by the health trend  
Ongoing scepticism over FF beverages and preference for naturally healthy foods and beverages dampen category sales over the forecast period  
Steady performance of FF hot drinks over the forecast period

#### CATEGORY DATA

Table 31 - Sales of Fortified/Functional Beverages by Category: Value 2016-2021  
Table 32 - Sales of Fortified/Functional Beverages by Category: % Value Growth 2016-2021  
Table 33 - Key Functional Ingredients in Fortified/Functional 100% Juice: % Value 2016-2021  
Table 34 - NBO Company Shares of Fortified/Functional Beverages: % Value 2017-2021  
Table 35 - LBN Brand Shares of Fortified/Functional Beverages: % Value 2018-2021  
Table 36 - Distribution of Fortified/Functional Beverages by Format: % Value 2016-2021  
Table 37 - Forecast Sales of Fortified/Functional Beverages by Category: Value 2021-2026  
Table 38 - Forecast Sales of Fortified/Functional Beverages by Category: % Value Growth 2021-2026

## Fortified/Functional Packaged Food in Morocco

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

FF packaged food proves resilient to the COVID-19 pandemic, especially among urban dwellers  
Households are more heavily influenced by the product label and players' efforts to maintain or reduce unit prices  
Nestlé maintains its lead but significantly reduces its investment in fortified/functional packaged food in Morocco

## PROSPECTS AND OPPORTUNITIES

Fortified/functional packaged food continues to register a good sales performance

Demand for specific vitamins and minerals drives key players to incorporate them in their new product developments which themselves are informed by online communications

Naturally healthy packaged and unpackaged food pose a threat over the forecast period

## CATEGORY DATA

Table 39 - Sales of Fortified/Functional Packaged Food by Category: Value 2016-2021

Table 40 - Sales of Fortified/Functional Packaged Food by Category: % Value Growth 2016-2021

Table 41 - Key Functional Ingredients in Fortified/Functional Breakfast Cereals: % Value 2016-2021

Table 42 - Key Functional Ingredients in Fortified/Functional Bread: % Value 2016-2021

Table 43 - Key Functional Ingredients in Fortified/Functional Sugar Confectionery: % Value 2016-2021

Table 44 - Key Functional Ingredients in Fortified/Functional Sweet Biscuits: % Value 2016-2021

Table 45 - Sales of Fortified/Functional Yoghurt by Standard Fat vs Reduced Fat: % Value 2016-2021

Table 46 - NBO Company Shares of Fortified/Functional Packaged Food: % Value 2017-2021

Table 47 - LBN Brand Shares of Fortified/Functional Packaged Food: % Value 2018-2021

Table 48 - LBN Brand Shares of Fortified/Functional Bread: % Value 2018-2021

Table 49 - Distribution of Fortified/Functional Packaged Food by Format: % Value 2016-2021

Table 50 - Forecast Sales of Fortified/Functional Packaged Food by Category: Value 2021-2026

Table 51 - Forecast Sales of Fortified/Functional Packaged Food by Category: % Value Growth 2021-2026

## Free From in Morocco

## KEY DATA FINDINGS

### 2021 DEVELOPMENTS

Demand for free from dairy products grows via modern grocery retailers

Free from dairy performs registers best performance in 2021 though Cooperative Copag considers discontinuing its free from lactose milk

Little demand for free from gluten dairy despite growing awareness of gluten intolerance

## PROSPECTS AND OPPORTUNITIES

Strong forecast period growth for the category from 2022 onwards encourages industry players to launch new products

Free from gluten achieves strong growth over the forecast period

High prices have the potential to dampen demand for free from gluten over the forecast period

## CATEGORY DATA

Table 52 - Sales of Free From by Category: Value 2016-2021

Table 53 - Sales of Free From by Category: % Value Growth 2016-2021

Table 54 - NBO Company Shares of Free From: % Value 2017-2021

Table 55 - LBN Brand Shares of Free From: % Value 2018-2021

Table 56 - Distribution of Free From by Format: % Value 2016-2021

Table 57 - Forecast Sales of Free From by Category: Value 2021-2026

Table 58 - Forecast Sales of Free From by Category: % Value Growth 2021-2026

## Naturally Healthy Beverages in Morocco

## KEY DATA FINDINGS

### 2021 DEVELOPMENTS

Slowdown for naturally healthy beverages in 2021 after peak sales in the previous year

Despite NH claims on product labels, Moroccans remain sceptical about packaged products, including NH beverages

Ongoing growing demand for NH hot drinks as these products are reputed to soothe symptoms of colds and the COVID-19 virus

## PROSPECTS AND OPPORTUNITIES

Some slowdown for NH beverages over the forecast period though growth remains positive  
The health and wellness trend continues to have a positive impact on NH beverages, while high prices act as a drag  
Social media continues to play an important role in marketing

#### CATEGORY DATA

- Table 59 - Sales of NH Beverages by Category: Value 2016-2021
- Table 60 - Sales of NH Beverages by Category: % Value Growth 2016-2021
- Table 61 - NBO Company Shares of NH Beverages: % Value 2017-2021
- Table 62 - LBN Brand Shares of NH Beverages: % Value 2018-2021
- Table 63 - Distribution of NH Beverages by Format: % Value 2016-2021
- Table 64 - Forecast Sales of NH Beverages by Category: Value 2021-2026
- Table 65 - Forecast Sales of NH Beverages by Category: % Value Growth 2021-2026

#### Naturally Healthy Packaged Food in Morocco

##### KEY DATA FINDINGS

##### 2021 DEVELOPMENTS

The Agricultural Development Agency (ADA) implements a new concept store for the promotion of local products, perceived as naturally healthy  
Confusion between naturally healthy and organic products  
E-commerce platforms help local producers to sell their brands and record rapid growth

##### PROSPECTS AND OPPORTUNITIES

NH packaged food performs remarkably over the forecast period as consumers continually become more health-conscious  
Local brands and production gather momentum boosting players such as Centrale Commerciale les Domaines  
Home-made food poses a threat to the category as some consumers question the healthfulness of NH packaged food

#### CATEGORY DATA

- Table 66 - Sales of NH Packaged Food by Category: Value 2016-2021
- Table 67 - Sales of NH Packaged Food by Category: % Value Growth 2016-2021
- Table 68 - NBO Company Shares of NH Packaged Food: % Value 2017-2021
- Table 69 - LBN Brand Shares of NH Packaged Food: % Value 2018-2021
- Table 70 - Distribution of NH Packaged Food by Format: % Value 2016-2021
- Table 71 - Forecast Sales of NH Packaged Food by Category: Value 2021-2026
- Table 72 - Forecast Sales of NH Packaged Food by Category: % Value Growth 2021-2026

#### Organic Beverages in Morocco

##### 2021 DEVELOPMENTS

#### Organic Packaged Food in Morocco

##### KEY DATA FINDINGS

##### 2021 DEVELOPMENTS

The pandemic stimulates changes in consumer behaviour, boosting demand for organic packaged food  
Rise of e-commerce following the pandemic propels the growth of organic packaged food in Morocco  
Sopalim remains the leading player in 2021

##### PROSPECTS AND OPPORTUNITIES

Organic packaged food benefits from increasing awareness and demand post pandemic  
Establishment of organic associations promote organic farming in the country  
The Green Generation plan increases the retail volume sales of organic edible oils in Morocco

#### CATEGORY DATA

Table 73 - Sales of Organic Packaged Food by Category: Value 2016-2021

Table 74 - Sales of Organic Packaged Food by Category: % Value Growth 2016-2021

Table 75 - NBO Company Shares of Organic Packaged Food: % Value 2017-2021

Table 76 - LBN Brand Shares of Organic Packaged Food: % Value 2018-2021

Table 77 - Distribution of Organic Packaged Food by Format: % Value 2016-2021

Table 78 - Forecast Sales of Organic Packaged Food by Category: Value 2021-2026

Table 79 - Forecast Sales of Organic Packaged Food by Category: % Value Growth 2021-2026

## 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/health-and-wellness-in-morocco/report](http://www.euromonitor.com/health-and-wellness-in-morocco/report).