



# Spirits in Morocco

July 2022

Table of Contents

## Spirits in Morocco - Category analysis

### KEY DATA FINDINGS

#### 2021 DEVELOPMENTS

Spirits continues to struggle in 2021 due to weak disposable incomes and lack of tourists  
Other spirits the most dynamic performer in the category  
Imports of more affordable spirits thrive amid weak economic conditions  
Imports of Scotch whisky from the UK surge following Brexit deal  
Flavoured options account for almost half of vodka sales  
Chai Andrieux leads spirits due to dominance of domestic Mahia

#### PROSPECTS AND OPPORTUNITIES

Spirits to experience modest growth over forecast period  
Local Mahia to continue to drive sales of spirits  
Flavoured vodka will continue to gain in popularity  
Further penetration by brands of gin and whiskies anticipated in the future

#### CATEGORY BACKGROUND

Vodka, gin, other blended Scotch whisky, dark rum and white rum price band methodology  
Summary 1 - Benchmark Brands 2021

#### CATEGORY DATA

Table 1 - Sales of Spirits by Category: Total Volume 2016-2021  
Table 2 - Sales of Spirits by Category: Total Value 2016-2021  
Table 3 - Sales of Spirits by Category: % Total Volume Growth 2016-2021  
Table 4 - Sales of Spirits by Category: % Total Value Growth 2016-2021  
Table 5 - Sales of Spirits by Off-trade vs On-trade: Volume 2016-2021  
Table 6 - Sales of Spirits by Off-trade vs On-trade: Value 2016-2021  
Table 7 - Sales of Spirits by Off-trade vs On-trade: % Volume Growth 2016-2021  
Table 8 - Sales of Spirits by Off-trade vs On-trade: % Value Growth 2016-2021  
Table 9 - Sales of White Rum by Price Platform: % Total Volume 2016-2021  
Table 10 - Sales of Other Blended Scotch Whisky by Price Platform: % Total Volume 2016-2021  
Table 11 - Sales of English Gin by Price Platform: % Total Volume 2016-2021  
Table 12 - Sales of Vodka by Price Platform: % Total Volume 2016-2021  
Table 13 - Sales of Vodka by Flavoured vs Non-flavoured: % Total Volume 2016-2021  
Table 14 - GBO Company Shares of Spirits: % Total Volume 2017-2021  
Table 15 - NBO Company Shares of Spirits: % Total Volume 2017-2021  
Table 16 - LBN Brand Shares of Spirits: % Total Volume 2018-2021  
Table 17 - Forecast Sales of Spirits by Category: Total Volume 2021-2026  
Table 18 - Forecast Sales of Spirits by Category: Total Value 2021-2026  
Table 19 - Forecast Sales of Spirits by Category: % Total Volume Growth 2021-2026  
Table 20 - Forecast Sales of Spirits by Category: % Total Value Growth 2021-2026

## Alcoholic Drinks in Morocco - Industry Overview

### EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture  
Reduction of customs duties offset by rising consumption tax  
Companies compete by expanding product offer while maintaining low prices  
Players open their own stores to offer competitive prices  
Significant decline for on-trade with closure of horeca and limited tourism due to pandemic  
What next for alcoholic drinks?  
Chart 1 - Alcoholic Drinks Off-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 2 - Alcoholic Drinks On-Trade Volume Sales Growth Scenarios: 2019-2026

Chart 3 - Alcoholic Drinks Impact of Soft Drivers on Off-Trade Volume Sales: 2019-2026

Chart 4 - Alcoholic Drinks Impact of Soft Drivers on On-Trade Volume Sales: 2019-2026

## MARKET BACKGROUND

Legislation

Legal purchasing age and legal drinking age

Drink driving

Advertising

Smoking ban

Opening hours

On-trade establishments

Summary 2 - Number of On-trade Establishments by Type 2015-2021

## TAXATION AND DUTY LEVIES

### IMPORT TAX

TAX INTERIOR DU CONSUMMATION OR INTERNAL CONSUMPTION TAX (TIC)

CUSTOMS TAXES ON ALCOHOLIC DRINKS IMPORTED FROM NON-EUROPEAN COUNTRIES

SPECIFIC VAT ON ALCOHOLIC DRINKS

Summary 3 - Taxation and Duty Levies on Alcoholic Drinks 2021

### OPERATING ENVIRONMENT

Contraband/parallel trade

Duty free

Cross-border/private imports

### KEY NEW PRODUCT LAUNCHES

Outlook

### MARKET INDICATORS

Table 21 - Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

### MARKET DATA

Table 22 - Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

Table 23 - Sales of Alcoholic Drinks by Category: Total Value 2016-2021

Table 24 - Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

Table 25 - Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

Table 26 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

Table 27 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

Table 28 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

Table 29 - Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

Table 30 - GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

Table 31 - Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

Table 32 - Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2021

Table 33 - Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

Table 34 - Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

Table 35 - Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-2026

Table 36 - Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

### DISCLAIMER

### SOURCES

## 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/spirits-in-morocco/report](http://www.euromonitor.com/spirits-in-morocco/report).