

Consumer Foodservice in Morocco

February 2024

Table of Contents

Consumer Foodservice in Morocco

EXECUTIVE SUMMARY

Consumer foodservice in 2023: The big picture

2023 key trends

Competitive landscape

Independent foodservice developments

What next for consumer foodservice?

MARKET DATA

- Table 1 Units, Transactions and Value Sales in Consumer Foodservice 2018-2023
- Table 2 Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2018-2023
- Table 3 Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2023
- Table 4 Consumer Foodservice by Independent vs Chained: % Foodservice Value 2018-2023
- Table 5 Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2018-2023
- Table 6 Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2023
- Table 7 Sales in Consumer Foodservice by Location: % Foodservice Value 2018-2023
- Table 8 Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2018-2023
- Table 9 GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2019-2023
- Table 10 GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2020-2023
- Table 11 GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2023
- Table 12 Forecast Units, Transactions and Value Sales in Consumer Foodservice 2023-2028
- Table 13 Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Cafés/Bars in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Global coffee chains spearhead developments

Popularity of coffee supports speciality cafés

Digital ordering is emerging

PROSPECTS AND OPPORTUNITIES

International players will continue to be attracted by the stability and coffee culture in Morocco

Tourism growth drives higher coffee consumption

Independents face a tougher competitive landscape

CATEGORY DATA

- Table 14 Cafés/Bars by Category: Units/Outlets 2018-2023
- Table 15 Sales in Cafés/Bars by Category: Number of Transactions 2018-2023
- Table 16 Sales in Cafés/Bars by Category: Foodservice Value 2018-2023
- Table 17 Cafés/Bars by Category: % Units/Outlets Growth 2018-2023
- Table 18 Sales in Cafés/Bars by Category: % Transaction Growth 2018-2023
- Table 19 Sales in Cafés/Bars by Category: % Foodservice Value Growth 2018-2023
- Table 20 GBO Company Shares in Chained Cafés/Bars: % Foodservice Value 2019-2023
- Table 21 GBN Brand Shares in Chained Cafés/Bars: % Foodservice Value 2020-2023
- Table 22 Forecast Cafés/Bars by Category: Units/Outlets 2023-2028
- Table 23 Forecast Sales in Cafés/Bars by Category: Number of Transactions 2023-2028

- Table 24 Forecast Sales in Cafés/Bars by Category: Foodservice Value 2023-2028
- Table 25 Forecast Cafés/Bars by Category: % Units/Outlets Growth 2023-2028
- Table 26 Forecast Sales in Cafés/Bars by Category: % Transaction Growth 2023-2028
- Table 27 Forecast Sales in Cafés/Bars by Category: % Foodservice Value Growth 2023-2028

Full-Service Restaurants in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Full-service restaurants are slower to recover as domestic demand wanes

Limited development of chains in full-service restaurants

Spotlight on food safety standards

PROSPECTS AND OPPORTUNITIES

Tourism recovery to support full-service restaurants

Consumers seek out special experiences

Online ordering and delivery offers a chance to compete against limited-service restaurants

CATEGORY DATA

- Table 28 Full-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 29 Sales in Full-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 30 Sales in Full-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 31 Full-Service Restaurants by Category: % Units/Outlets Growth 2018-2023
- Table 32 Sales in Full-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 33 Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 34 GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2019-2023
- Table 35 GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2020-2023
- Table 36 Forecast Full-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 37 Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 38 Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 39 Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 40 Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 41 Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Limited-Service Restaurants in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Focus on convenience supports sales growth

International brands expand in Morocco

Brands provide local support through corporate social responsibility

PROSPECTS AND OPPORTUNITIES

Digital technology to enhance the customer experience

Drive-through outlets to gain appeal

Consumers want to sample new cuisines

CATEGORY DATA

- Table 42 Limited-Service Restaurants by Category: Units/Outlets 2018-2023
- Table 43 Sales in Limited-Service Restaurants by Category: Number of Transactions 2018-2023
- Table 44 Sales in Limited-Service Restaurants by Category: Foodservice Value 2018-2023
- Table 45 Limited-Service Restaurants by Category: % Units/Outlets Growth 2018-2023

- Table 46 Sales in Limited-Service Restaurants by Category: % Transaction Growth 2018-2023
- Table 47 Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2018-2023
- Table 48 GBO Company Shares in Chained Limited-Service Restaurants: % Foodservice Value 2019-2023
- Table 49 GBN Brand Shares in Chained Limited-Service Restaurants: % Foodservice Value 2020-2023
- Table 50 Forecast Limited-Service Restaurants by Category: Units/Outlets 2023-2028
- Table 51 Forecast Sales in Limited-Service Restaurants by Category: Number of Transactions 2023-2028
- Table 52 Forecast Sales in Limited-Service Restaurants by Category: Foodservice Value 2023-2028
- Table 53 Forecast Limited-Service Restaurants by Category: % Units/Outlets Growth 2023-2028
- Table 54 Forecast Sales in Limited-Service Restaurants by Category: % Transaction Growth 2023-2028
- Table 55 Forecast Sales in Limited-Service Restaurants by Category: % Foodservice Value Growth 2023-2028

Consumer Foodservice By Location in Morocco

KEY DATA FINDINGS

2023 DEVELOPMENTS

Chained foodservice brands are gaining ground on standalones

Tourism supports foodservice developments in lodging locations

Affordable foodservice options required to meet needs of locals

PROSPECTS AND OPPORTUNITIES

Tourism expansion to support development of travel and lodging locations

Lacklustre real estate market may support new developments

CATEGORY DATA

- Table 56 Consumer Foodservice by Location: Units/Outlets 2018-2023
- Table 57 Sales in Consumer Foodservice by Location: Number of Transactions 2018-2023
- Table 58 Sales in Consumer Foodservice by Location: Foodservice Value 2018-2023
- Table 59 Consumer Foodservice by Location: % Units/Outlets Growth 2018-2023
- Table 60 Sales in Consumer Foodservice by Location: % Transaction Growth 2018-2023
- Table 61 Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2018-2023
- Table 62 Consumer Foodservice through Standalone: Units/Outlets 2018-2023
- Table 63 Sales in Consumer Foodservice through Standalone: Number of Transactions 2018-2023
- Table 64 Sales in Consumer Foodservice through Standalone: Foodservice Value 2018-2023
- Table 65 Consumer Foodservice through Standalone: % Units/Outlets Growth 2018-2023
- Table 66 Sales in Consumer Foodservice through Standalone: % Transaction Growth 2018-2023
- Table 67 Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2018-2023
- Table 68 Consumer Foodservice through Leisure: Units/Outlets 2018-2023
- Table 69 Sales in Consumer Foodservice through Leisure: Number of Transactions 2018-2023
- Table 70 Sales in Consumer Foodservice through Leisure: Foodservice Value 2018-2023
- Table 71 Consumer Foodservice through Leisure: % Units/Outlets Growth 2018-2023
- Table 72 Sales in Consumer Foodservice through Leisure: % Transaction Growth 2018-2023
- Table 73 Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2018-2023
- Table 74 Consumer Foodservice through Retail: Units/Outlets 2018-2023
- Table 75 Sales in Consumer Foodservice through Retail: Number of Transactions 2018-2023
- Table 76 Sales in Consumer Foodservice through Retail: Foodservice Value 2018-2023
- Table 77 Consumer Foodservice through Retail: % Units/Outlets Growth 2018-2023
- Table 78 Sales in Consumer Foodservice through Retail: % Transaction Growth 2018-2023
- Table 79 Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2018-2023
- Table 80 Consumer Foodservice through Lodging: Units/Outlets 2018-2023
- Table 81 Sales in Consumer Foodservice through Lodging: Number of Transactions 2018-2023
- Table 82 Sales in Consumer Foodservice through Lodging: Foodservice Value 2018-2023
- Table 83 Consumer Foodservice through Lodging: % Units/Outlets Growth 2018-2023

- Table 84 Sales in Consumer Foodservice through Lodging: % Transaction Growth 2018-2023
- Table 85 Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2018-2023
- Table 86 Consumer Foodservice through Travel: Units/Outlets 2018-2023
- Table 87 Sales in Consumer Foodservice through Travel: Number of Transactions 2018-2023
- Table 88 Sales in Consumer Foodservice through Travel: Foodservice Value 2018-2023
- Table 89 Consumer Foodservice through Travel: % Units/Outlets Growth 2018-2023
- Table 90 Sales in Consumer Foodservice through Travel: % Transaction Growth 2018-2023
- Table 91 Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2018-2023
- Table 92 Forecast Consumer Foodservice by Location: Units/Outlets 2023-2028
- Table 93 Forecast Sales in Consumer Foodservice by Location: Number of Transactions 2023-2028
- Table 94 Forecast Sales in Consumer Foodservice by Location: Foodservice Value 2023-2028
- Table 95 Forecast Consumer Foodservice by Location: % Units/Outlets Growth 2023-2028
- Table 96 Forecast Sales in Consumer Foodservice by Location: % Transaction Growth 2023-2028
- Table 97 Forecast Sales in Consumer Foodservice by Location: % Foodservice Value Growth 2023-2028
- Table 98 Forecast Consumer Foodservice through Standalone: Units/Outlets 2023-2028
- Table 99 Forecast Sales in Consumer Foodservice through Standalone: Number of Transactions 2023-2028
- Table 100 Forecast Sales in Consumer Foodservice through Standalone: Foodservice Value 2023-2028
- Table 101 Forecast Consumer Foodservice through Standalone: % Units/Outlets Growth 2023-2028
- Table 102 Forecast Sales in Consumer Foodservice through Standalone: % Transaction Growth 2023-2028
- Table 103 Forecast Sales in Consumer Foodservice through Standalone: % Foodservice Value Growth 2023-2028
- Table 104 Forecast Consumer Foodservice through Leisure: Units/Outlets 2023-2028
- Table 105 Forecast Sales in Consumer Foodservice through Leisure: Number of Transactions 2023-2028
- Table 106 Forecast Sales in Consumer Foodservice through Leisure: Foodservice Value 2023-2028
- Table 107 Forecast Consumer Foodservice through Leisure: % Units/Outlets Growth 2023-2028
- Table 108 Forecast Sales in Consumer Foodservice through Leisure: % Transaction Growth 2023-2028
- Table 109 Forecast Sales in Consumer Foodservice through Leisure: % Foodservice Value Growth 2023-2028
- Table 110 Forecast Consumer Foodservice through Retail: Units/Outlets 2023-2028
- Table 111 Forecast Sales in Consumer Foodservice through Retail: Number of Transactions 2023-2028
- Table 112 Forecast Sales in Consumer Foodservice through Retail: Foodservice Value 2023-2028
- Table 113 Forecast Consumer Foodservice through Retail: % Units/Outlets Growth 2023-2028
- Table 114 Forecast Sales in Consumer Foodservice through Retail: % Transaction Growth 2023-2028
- Table 115 Forecast Sales in Consumer Foodservice through Retail: % Foodservice Value Growth 2023-2028
- Table 116 Forecast Consumer Foodservice through Lodging: Units/Outlets 2023-2028
- Table 117 Forecast Sales in Consumer Foodservice through Lodging: Number of Transactions 2023-2028
- Table 118 Forecast Sales in Consumer Foodservice through Lodging: Foodservice Value 2023-2028
- Table 119 Forecast Consumer Foodservice through Lodging: % Units/Outlets Growth 2023-2028
- Table 120 Forecast Sales in Consumer Foodservice through Lodging: % Transaction Growth 2023-2028
- Table 121 Forecast Sales in Consumer Foodservice through Lodging: % Foodservice Value Growth 2023-2028
- Table 122 Forecast Consumer Foodservice through Travel: Units/Outlets 2023-2028
- Table 123 Forecast Sales in Consumer Foodservice through Travel: Number of Transactions 2023-2028
- Table 124 Forecast Sales in Consumer Foodservice through Travel: Foodservice Value 2023-2028
- Table 125 Forecast Consumer Foodservice through Travel: % Units/Outlets Growth 2023-2028
- Table 126 Forecast Sales in Consumer Foodservice through Travel: % Transaction Growth 2023-2028
- Table 127 Forecast Sales in Consumer Foodservice through Travel: % Foodservice Value Growth 2023-2028

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/consumer-foodservice-in-morocco/report.