



Euromonitor
International

Fresh Food in Morocco

January 2025

Table of Contents

EXECUTIVE SUMMARY

- Fresh food in 2024: The big picture
- 2024 key trends
- Retailing developments
- What next for fresh food?

MARKET DATA

- Table 1 - Total Sales of Fresh Food by Category: Total Volume 2019-2024
- Table 2 - Total Sales of Fresh Food by Category: % Total Volume Growth 2019-2024
- Table 3 - Retail Sales of Fresh Food by Category: Volume 2019-2024
- Table 4 - Retail Sales of Fresh Food by Category: % Volume Growth 2019-2024
- Table 5 - Retail Sales of Fresh Food by Category: Value 2019-2024
- Table 6 - Retail Sales of Fresh Food by Category: % Value Growth 2019-2024
- Table 7 - Retail Sales of Fresh Food by Packaged vs Unpackaged: % Volume 2019-2024
- Table 8 - Retail Distribution of Fresh Food by Format: % Volume 2019-2024
- Table 9 - Forecast Total Sales of Fresh Food by Category: Total Volume 2024-2029
- Table 10 - Forecast Total Sales of Fresh Food by Category: % Total Volume Growth 2024-2029
- Table 11 - Forecast Retail Sales of Fresh Food by Category: Volume 2024-2029
- Table 12 - Forecast Retail Sales of Fresh Food by Category: % Volume Growth 2024-2029
- Table 13 - Forecast Retail Sales of Fresh Food by Category: Value 2024-2029
- Table 14 - Forecast Retail Sales of Fresh Food by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Affordability and versatility drives total volume growth for eggs in 2024
- Growing awareness of health and sustainability drives demand for organic eggs
- Foodservice volume growth outperforms retail growth, with boiled eggs being a popular choice

PROSPECTS AND OPPORTUNITIES

- Eggs are expected to continue benefiting from being a budget-friendly protein option
- Free-range and organic eggs are set to drive up value sales across the forecast period
- Strong tourism flows is expected to support the growth of eggs sales through foodservice
- Summary 2 - Major Processors of Eggs 2024

CATEGORY DATA

- Table 15 - Total Sales of Eggs: Total Volume 2019-2024
- Table 16 - Total Sales of Eggs: % Total Volume Growth 2019-2024
- Table 17 - Retail Sales of Eggs: Volume 2019-2024
- Table 18 - Retail Sales of Eggs: % Volume Growth 2019-2024
- Table 19 - Retail Sales of Eggs: Value 2019-2024
- Table 20 - Retail Sales of Eggs: % Value Growth 2019-2024
- Table 21 - Retail Sales of Eggs by Packaged vs Unpackaged: % Volume 2019-2024
- Table 22 - Forecast Total Sales of Eggs: Total Volume 2024-2029
- Table 23 - Forecast Total Sales of Eggs: % Total Volume Growth 2024-2029

Table 24 - Forecast Retail Sales of Eggs: Volume 2024-2029

Table 25 - Forecast Retail Sales of Eggs: % Volume Growth 2024-2029

Table 26 - Forecast Retail Sales of Eggs: Value 2024-2029

Table 27 - Forecast Retail Sales of Eggs: % Value Growth 2024-2029

Fish and Seafood in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Reduced catch volumes lead to an increase in prices for fish and seafood
- Crustaceans record strong results, driven by rising sales of frozen prawns
- Price rises in 2024 lead consumers to migrate to cheaper, more affordable fish

PROSPECTS AND OPPORTUNITIES

- The rising health and wellness trend is expected to continue benefiting sales
 - Foodservice growth is expected to outpace retail growth as seafood restaurants expand
 - There is potential for increased consumption and local production over the forecast period
- Summary 3 - Major Processors of Fish and Seafood 2024

CATEGORY DATA

Table 28 - Total Sales of Fish and Seafood by Category: Total Volume 2019-2024

Table 29 - Total Sales of Fish and Seafood by Category: % Total Volume Growth 2019-2024

Table 30 - Retail Sales of Fish and Seafood by Category: Volume 2019-2024

Table 31 - Retail Sales of Fish and Seafood by Category: % Volume Growth 2019-2024

Table 32 - Retail Sales of Fish and Seafood by Category: Value 2019-2024

Table 33 - Retail Sales of Fish and Seafood by Category: % Value Growth 2019-2024

Table 34 - Retail Sales of Fish and Seafood by Packaged vs Unpackaged: % Volume 2019-2024

Table 35 - Forecast Total Sales of Fish and Seafood by Category: Total Volume 2024-2029

Table 36 - Forecast Total Sales of Fish and Seafood by Category: % Total Volume Growth 2024-2029

Table 37 - Forecast Retail Sales of Fish and Seafood by Category: Volume 2024-2029

Table 38 - Forecast Retail Sales of Fish and Seafood by Category: % Volume Growth 2024-2029

Table 39 - Forecast Retail Sales of Fish and Seafood by Category: Value 2024-2029

Table 40 - Forecast Retail Sales of Fish and Seafood by Category: % Value Growth 2024-2029

Fruits in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Weather conditions and rising price points challenge the domestic demand for fruits
- Cost-effective fruit options gain ground as higher unit prices deter consumers
- Climate challenges impact domestic supply as Morocco imports fresh fruits

PROSPECTS AND OPPORTUNITIES

- Fruit consumption is predicted to see an ongoing decline as high prices and weather conditions challenge sales
 - Premium fruit options are set to lose ground as consumers migrate to affordable options
 - Demand for pineapple and kiwi is set to fall as prices remain high across the forecast period
- Summary 4 - Major Processors of Fruits 2024

CATEGORY DATA

Table 41 - Total Sales of Fruits by Category: Total Volume 2019-2024

Table 42 - Total Sales of Fruits by Category: % Total Volume Growth 2019-2024

Table 43 - Retail Sales of Fruits by Category: Volume 2019-2024

Table 44 - Retail Sales of Fruits by Category: % Volume Growth 2019-2024

Table 45 - Retail Sales of Fruits by Category: Value 2019-2024

Table 46 - Retail Sales of Fruits by Category: % Value Growth 2019-2024

Table 47 - Retail Sales of Fruits by Packaged vs Unpackaged: % Volume 2019-2024

Table 48 - Forecast Total Sales of Fruits by Category: Total Volume 2024-2029

Table 49 - Forecast Total Sales of Fruits by Category: % Total Volume Growth 2024-2029

Table 50 - Forecast Retail Sales of Fruits by Category: Volume 2024-2029

Table 51 - Forecast Retail Sales of Fruits by Category: % Volume Growth 2024-2029

Table 52 - Forecast Retail Sales of Fruits by Category: Value 2024-2029

Table 53 - Forecast Retail Sales of Fruits by Category: % Value Growth 2024-2029

Meat in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

Inflation drives up red meat prices, while the government implements measures to ensure a steady supply of beef

Poultry sales benefit from affordable prices compared to other meat options

Modest growth for lamb, mutton, and goat as high price points reduce sales

PROSPECTS AND OPPORTUNITIES

Growth for meat is anticipated to be modest, challenged by high price points

There will continue to be limited prospects for pork consumption in Morocco

Poultry is expected to see the strongest performance, benefiting from an ongoing migration away from red meat

Summary 5 - Major Processors of Meat 2024

CATEGORY DATA

Table 54 - Total Sales of Meat by Category: Total Volume 2019-2024

Table 55 - Total Sales of Meat by Category: % Total Volume Growth 2019-2024

Table 56 - Retail Sales of Meat by Category: Volume 2019-2024

Table 57 - Retail Sales of Meat by Category: % Volume Growth 2019-2024

Table 58 - Retail Sales of Meat by Category: Value 2019-2024

Table 59 - Retail Sales of Meat by Category: % Value Growth 2019-2024

Table 60 - Retail Sales of Meat by Packaged vs Unpackaged: % Volume 2019-2024

Table 61 - Forecast Sales of Meat by Category: Total Volume 2024-2029

Table 62 - Forecast Sales of Meat by Category: % Total Volume Growth 2024-2029

Table 63 - Forecast Retail Sales of Meat by Category: Volume 2024-2029

Table 64 - Forecast Retail Sales of Meat by Category: % Volume Growth 2024-2029

Table 65 - Forecast Retail Sales of Meat by Category: Value 2024-2029

Table 66 - Forecast Retail Sales of Meat by Category: % Value Growth 2024-2029

Nuts in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

Sales of nuts rise as consumers reach for food that supports healthier diets

Social gatherings and festivals support the sales of nuts in Morrocco

Lower priced imports are a challenge for domestic nut producers

PROSPECTS AND OPPORTUNITIES

Ongoing growth is predicted for nuts as consumers reach for healthy snack and meal options

Ongoing growth is predicted for almonds, walnuts and peanuts, embraced as healthier impulse snacks

Nuts will be used in recipes for salads, baked goods, and traditional meals, driving sales

Summary 6 - Major Processors of Nuts 2024

CATEGORY DATA

- Table 67 - Total Sales of Nuts by Category: Total Volume 2019-2024
- Table 68 - Total Sales of Nuts by Category: % Total Volume Growth 2019-2024
- Table 69 - Retail Sales of Nuts by Category: Volume 2019-2024
- Table 70 - Retail Sales of Nuts by Category: % Volume Growth 2019-2024
- Table 71 - Retail Sales of Nuts by Category: Value 2019-2024
- Table 72 - Retail Sales of Nuts by Category: % Value Growth 2019-2024
- Table 73 - Retail Sales of Nuts by Packaged vs Unpackaged: % Volume 2019-2024
- Table 74 - Forecast Total Sales of Nuts by Category: Total Volume 2024-2029
- Table 75 - Forecast Total Sales of Nuts by Category: % Total Volume Growth 2024-2029
- Table 76 - Forecast Retail Sales of Nuts by Category: Volume 2024-2029
- Table 77 - Forecast Retail Sales of Nuts by Category: % Volume Growth 2024-2029
- Table 78 - Forecast Retail Sales of Nuts by Category: Value 2024-2029
- Table 79 - Forecast Retail Sales of Nuts by Category: % Value Growth 2024-2029

Pulses in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Local producers migrate away from pulse crops to more profitable alternatives
- Lentils remain affordable while being a common feature in consumers' meals
- Climate change and drought impact local cultivation of pulses

PROSPECTS AND OPPORTUNITIES

- Both affordability and traditional Moroccan cuisine is set to drive growth for pulses over the forecast period
- Other pulses are set to continue recording strong growth
- Changing lifestyles and demand for convenience may challenge sales over the forecast period

Summary 7 - Major Processors of Pulses 2024

CATEGORY DATA

- Table 80 - Total Sales of Pulses by Category: Total Volume 2019-2024
- Table 81 - Total Sales of Pulses by Category: % Total Volume Growth 2019-2024
- Table 82 - Retail Sales of Pulses by Category: Volume 2019-2024
- Table 83 - Retail Sales of Pulses by Category: % Volume Growth 2019-2024
- Table 84 - Retail Sales of Pulses by Category: Value 2019-2024
- Table 85 - Retail Sales of Pulses by Category: % Value Growth 2019-2024
- Table 86 - Retail Sales of Pulses by Packaged vs Unpackaged: % Volume 2019-2024
- Table 87 - Forecast Total Sales of Pulses by Category: Total Volume 2024-2029
- Table 88 - Forecast Total Sales of Pulses by Category: % Total Volume Growth 2024-2029
- Table 89 - Forecast Retail Sales of Pulses by Category: Volume 2024-2029
- Table 90 - Forecast Retail Sales of Pulses by Category: % Volume Growth 2024-2029
- Table 91 - Forecast Retail Sales of Pulses by Category: Value 2024-2029
- Table 92 - Forecast Retail Sales of Pulses by Category: % Value Growth 2024-2029

Starchy Roots in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Positive retail volume growth driven by the rising demand and sales of potatoes
- Potatoes record strong foodservice volume growth, driven by the rise of food outlets

Health attributes combine with affordability to drive sales of beetroot in 2024

PROSPECTS AND OPPORTUNITIES

Positive growth is anticipated, with retail sales driven by an uplift in home cooking
Frozen processed potatoes are expected to benefit from the rising demand for convenience
Consumers are expected to migrate from sweet potatoes to standard varieties
Summary 8 - Major Processors of Starchy Roots 2024

CATEGORY DATA

- Table 93 - Total Sales of Starchy Roots by Category: Total Volume 2019-2024
- Table 94 - Total Sales of Starchy Roots by Category: % Total Volume Growth 2019-2024
- Table 95 - Retail Sales of Starchy Roots by Category: Volume 2019-2024
- Table 96 - Retail Sales of Starchy Roots by Category: % Volume Growth 2019-2024
- Table 97 - Retail Sales of Starchy Roots by Category: Value 2019-2024
- Table 98 - Retail Sales of Starchy Roots by Category: % Value Growth 2019-2024
- Table 99 - Retail Sales of Starchy Roots by Packaged vs Unpackaged: % Volume 2019-2024
- Table 100 - Forecast Total Sales of Starchy Roots by Category: Total Volume 2024-2029
- Table 101 - Forecast Total Sales of Starchy Roots by Category: % Total Volume Growth 2024-2029
- Table 102 - Forecast Retail Sales of Starchy Roots by Category: Volume 2024-2029
- Table 103 - Forecast Retail Sales of Starchy Roots by Category: % Volume Growth 2024-2029
- Table 104 - Forecast Retail Sales of Starchy Roots by Category: Value 2024-2029
- Table 105 - Forecast Retail Sales of Starchy Roots by Category: % Value Growth 2024-2029

Sugar and Sweeteners in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

While health awareness challenges sugar sales, demand benefits from home cooking and baking
Rising demand for hot drinks boosts sales of both sugar and sweeteners in 2024
Brown sugar and organic varieties align with rising health trends

PROSPECTS AND OPPORTUNITIES

Health trends are expected to shape consumer buying habits and challenge sales of sugar
Foodservice is predicted to outperform retail sales, bolstered by ongoing tourism
A steady rise for brown and organic sugar is expected, as consumers migrate to healthier choices
Summary 9 - Major Processors of Sugar and Sweeteners 2024

CATEGORY DATA

- Table 106 - Total Sales of Sugar and Sweeteners: Total Volume 2019-2024
- Table 107 - Total Sales of Sugar and Sweeteners: % Total Volume Growth 2019-2024
- Table 108 - Retail Sales of Sugar and Sweeteners: Volume 2019-2024
- Table 109 - Retail Sales of Sugar and Sweeteners: % Volume Growth 2019-2024
- Table 110 - Retail Sales of Sugar and Sweeteners: Value 2019-2024
- Table 111 - Retail Sales of Sugar and Sweeteners: % Value Growth 2019-2024
- Table 112 - Retail Sales of Sugar and Sweeteners by Packaged vs Unpackaged: % Volume 2019-2024
- Table 113 - Forecast Total Sales of Sugar and Sweeteners: Total Volume 2024-2029
- Table 114 - Forecast Total Sales of Sugar and Sweeteners: % Total Volume Growth 2024-2029
- Table 115 - Forecast Retail Sales of Sugar and Sweeteners: Volume 2024-2029
- Table 116 - Forecast Retail Sales of Sugar and Sweeteners: % Volume Growth 2024-2029
- Table 117 - Forecast Retail Sales of Sugar and Sweeteners: Value 2024-2029
- Table 118 - Forecast Retail Sales of Sugar and Sweeteners: % Value Growth 2024-2029

Vegetables in Morocco

KEY DATA FINDINGS

2024 DEVELOPMENTS

Prices of vegetables surge locally, challenging total volume sales in 2024
Tomato production in Morocco declines, impacted by weather disruptions
Domestic onion consumption declines due to higher prices in 2024

PROSPECTS AND OPPORTUNITIES

Growth is expected to benefit from a rise in healthier home cooking
Vegetable prices are expected to continue rising across the forecast period
Staple and affordable vegetables that are central to Moroccan cuisine are expected to perform well
Summary 10 - Major Processors of Vegetables 2024

CATEGORY DATA

- Table 119 - Total Sales of Vegetables by Category: Total Volume 2019-2024
- Table 120 - Total Sales of Vegetables by Category: % Total Volume Growth 2019-2024
- Table 121 - Retail Sales of Vegetables by Category: Volume 2019-2024
- Table 122 - Retail Sales of Vegetables by Category: % Volume Growth 2019-2024
- Table 123 - Retail Sales of Vegetables by Category: Value 2019-2024
- Table 124 - Retail Sales of Vegetables by Category: % Value Growth 2019-2024
- Table 125 - Retail Sales of Vegetables by Packaged vs Unpackaged: % Volume 2019-2024
- Table 126 - Forecast Total Sales of Vegetables by Category: Total Volume 2024-2029
- Table 127 - Forecast Total Sales of Vegetables by Category: % Total Volume Growth 2024-2029
- Table 128 - Forecast Retail Sales of Vegetables by Category: Volume 2024-2029
- Table 129 - Forecast Retail Sales of Vegetables by Category: % Volume Growth 2024-2029
- Table 130 - Forecast Retail Sales of Vegetables by Category: Value 2024-2029
- Table 131 - Forecast Retail Sales of Vegetables by Category: % Value Growth 2024-2029

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/fresh-food-in-morocco/report.