



Passport

Consumer Health in Morocco

Euromonitor International

October 2021

This sample report is for illustration
purposes only.

Some content and data have been
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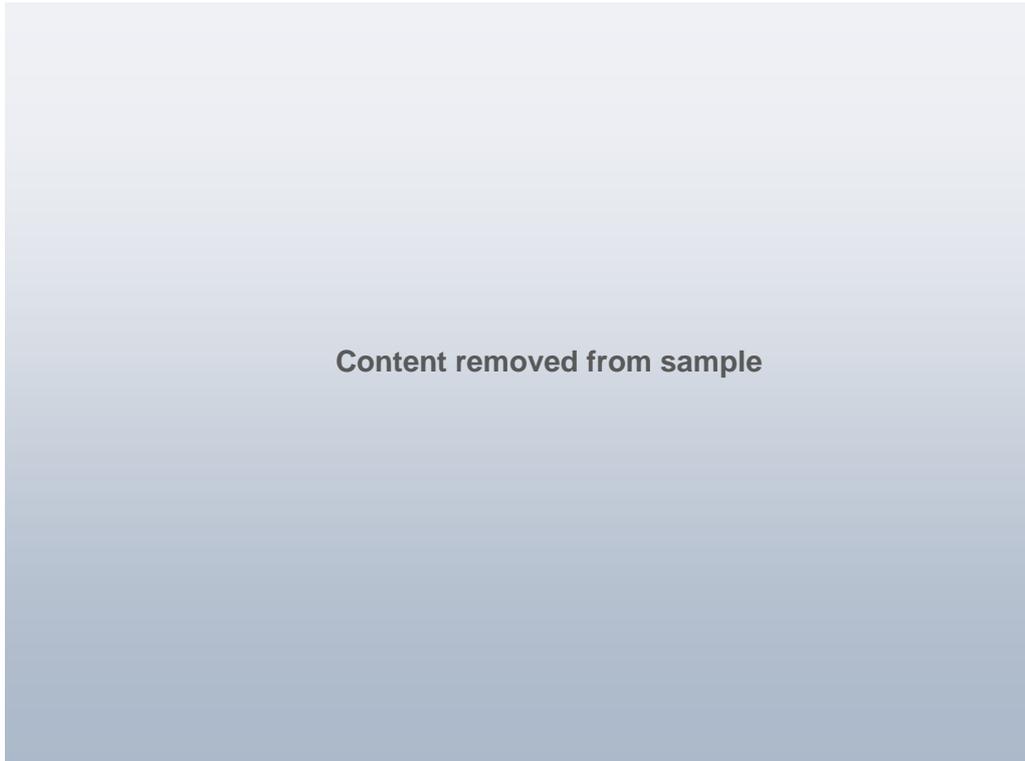
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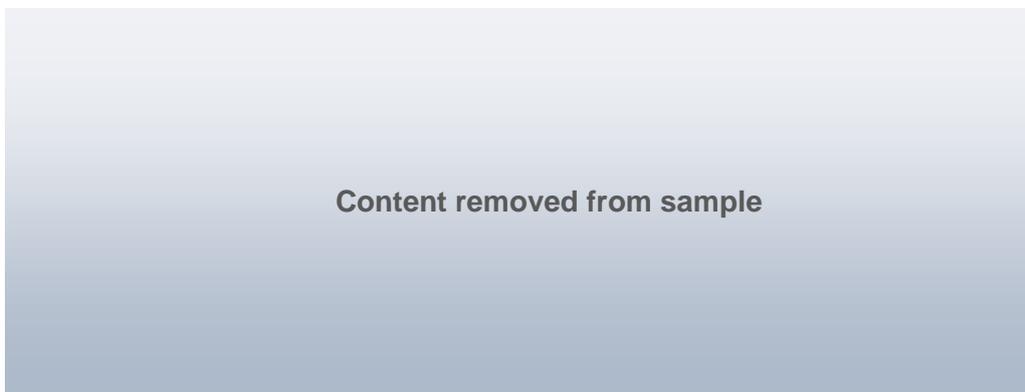
CONSUMER HEALTH IN MOROCCO - INDUSTRY OVERVIEW

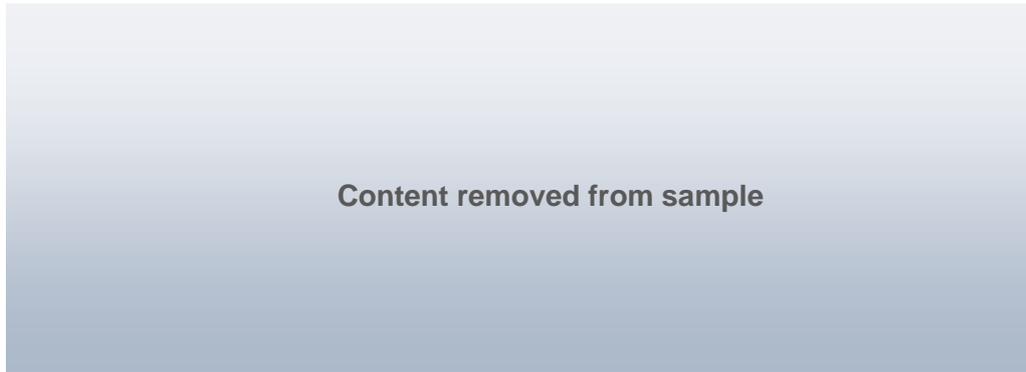
EXECUTIVE SUMMARY

Consumer health in 2021: The big picture

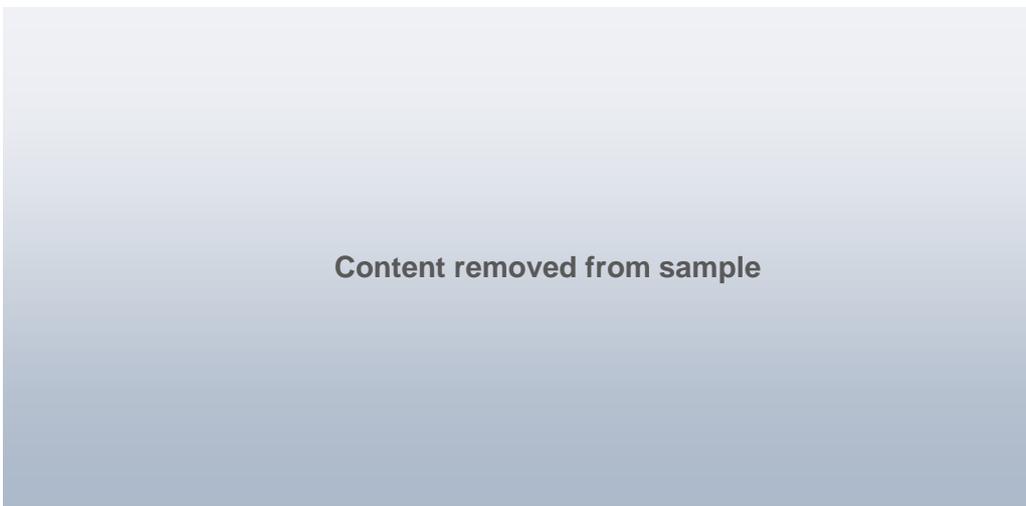


2021 key trends

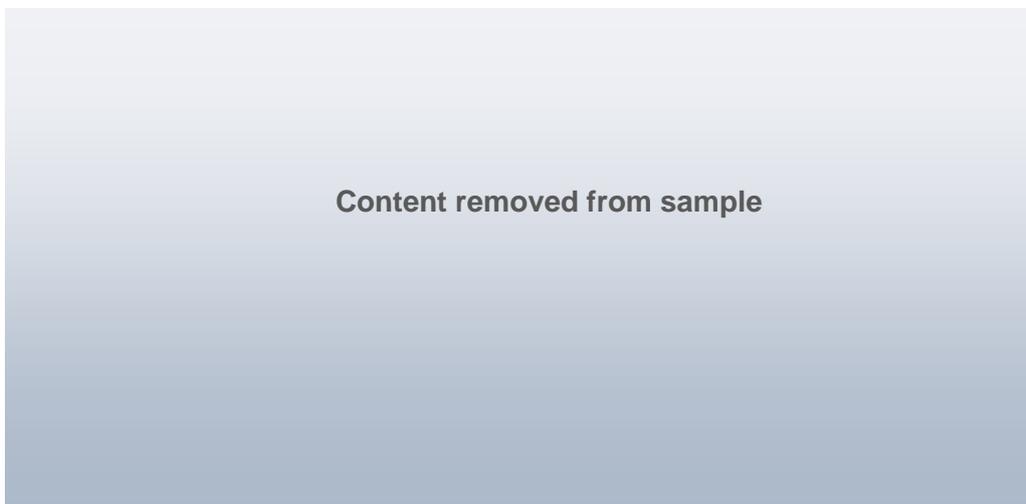


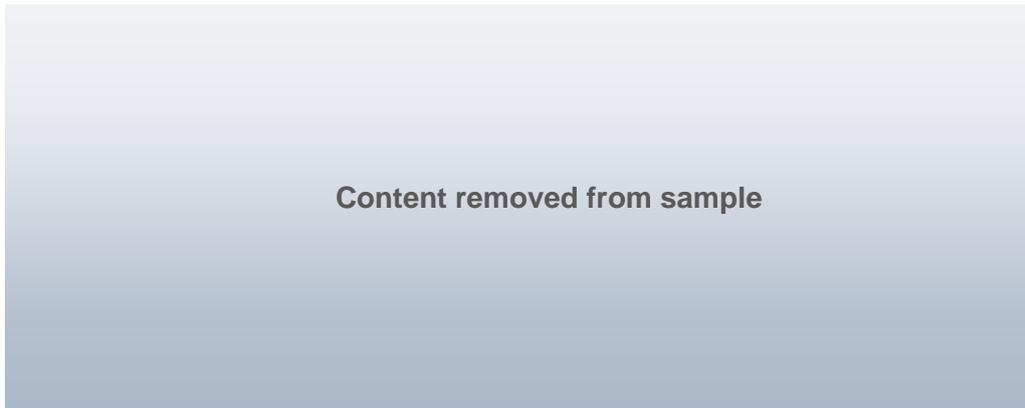


Retailing developments



What next for consumer health?





MARKET INDICATORS

Table 1 Consumer Expenditure on Health Goods and Medical Services: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
Pharmaceuticals, medical appliances/ equipment	Data removed from sample					
Outpatient services						
Hospital services						
Total						

Source: Euromonitor International from official statistics, trade associations, trade interviews

Table 2 Life Expectancy at Birth 2016-2021

years

	2016	2017	2018	2019	2020	2021
Males	Data removed from sample					
Females						

Source: Euromonitor International from official statistics

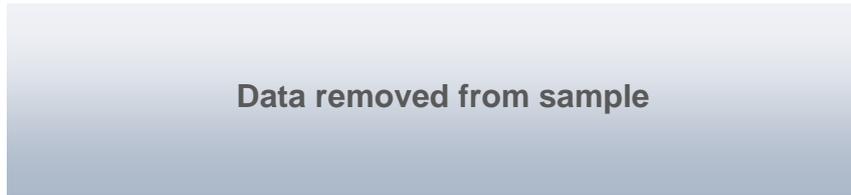
MARKET DATA

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

MAD million

	2016	2017	2018	2019	2020	2021
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and						

Wellbeing
Herbal/Traditional
Products
Allergy Care
Paediatric Consumer
Health
Consumer Health



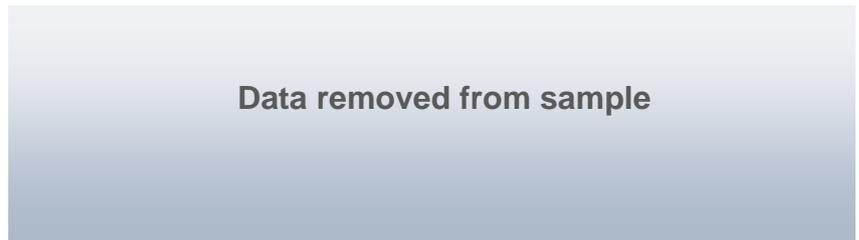
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

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

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

OTC
Sports Nutrition
Vitamins and Dietary Supplements
Weight Management and Wellbeing
Herbal/Traditional Products
Allergy Care
Paediatric Consumer Health
Consumer Health

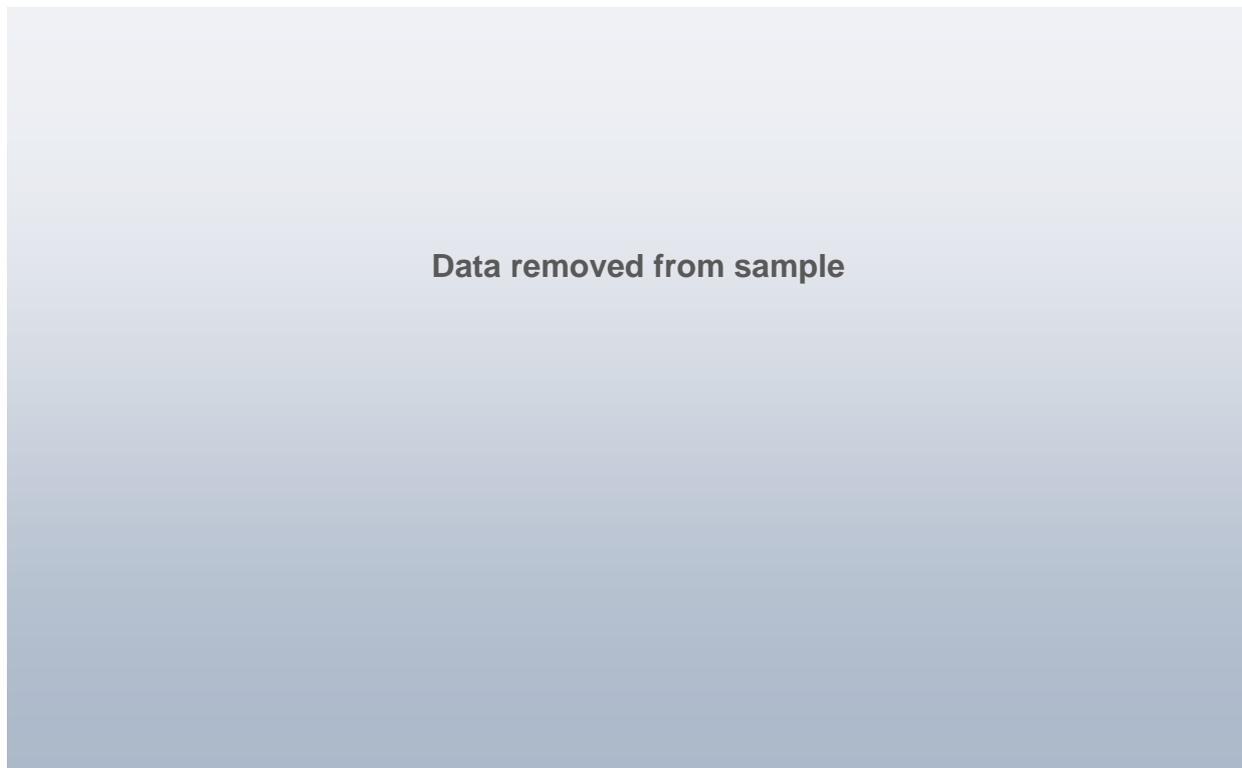


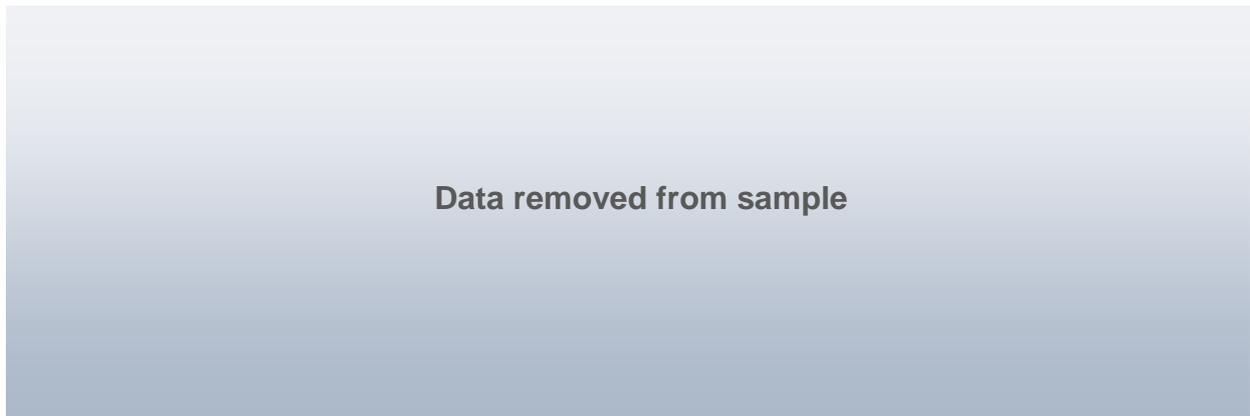
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Consumer Health: % Value 2017-2021

% retail value rsp
Company

2017 2018 2019 2020 2021

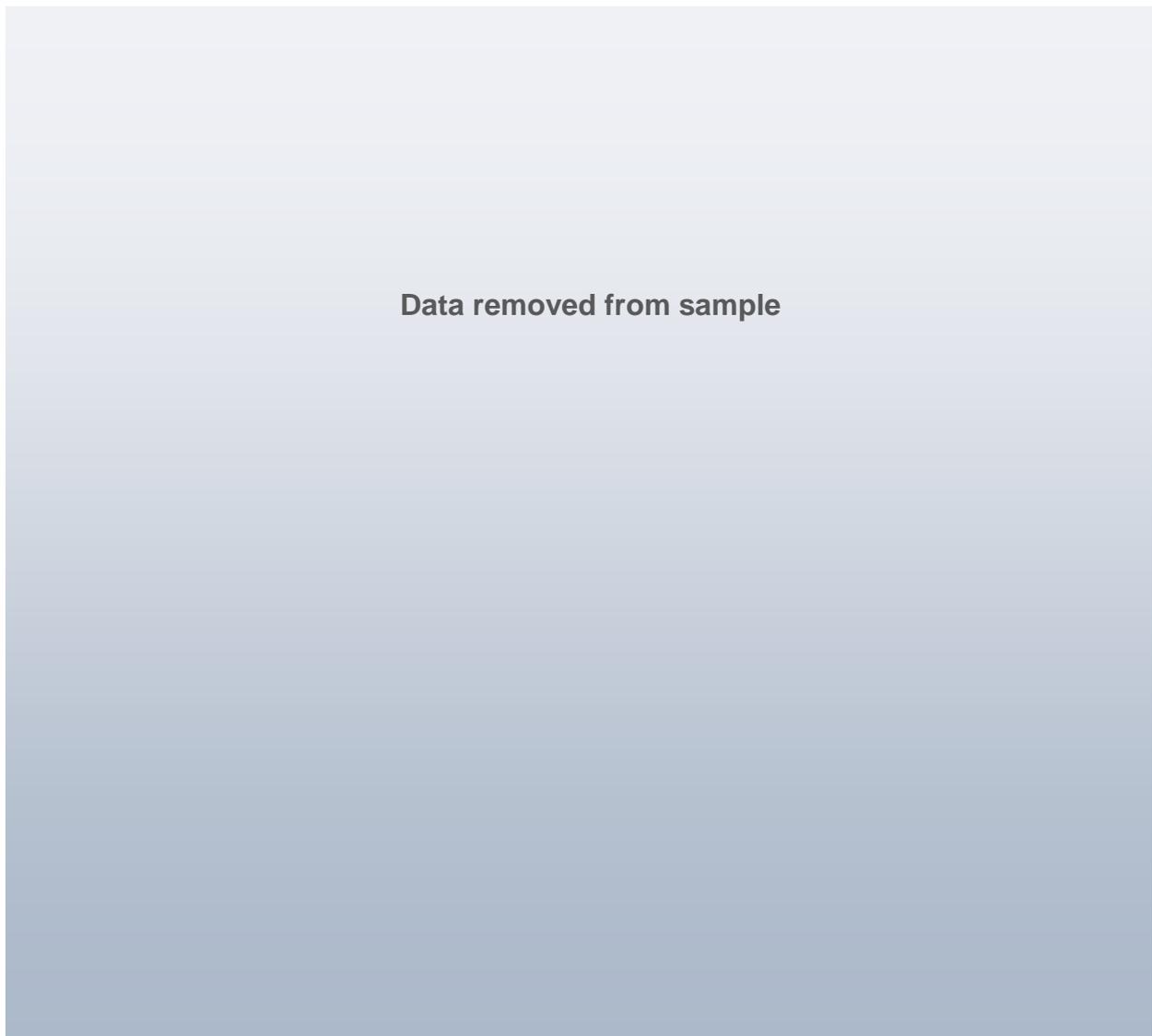


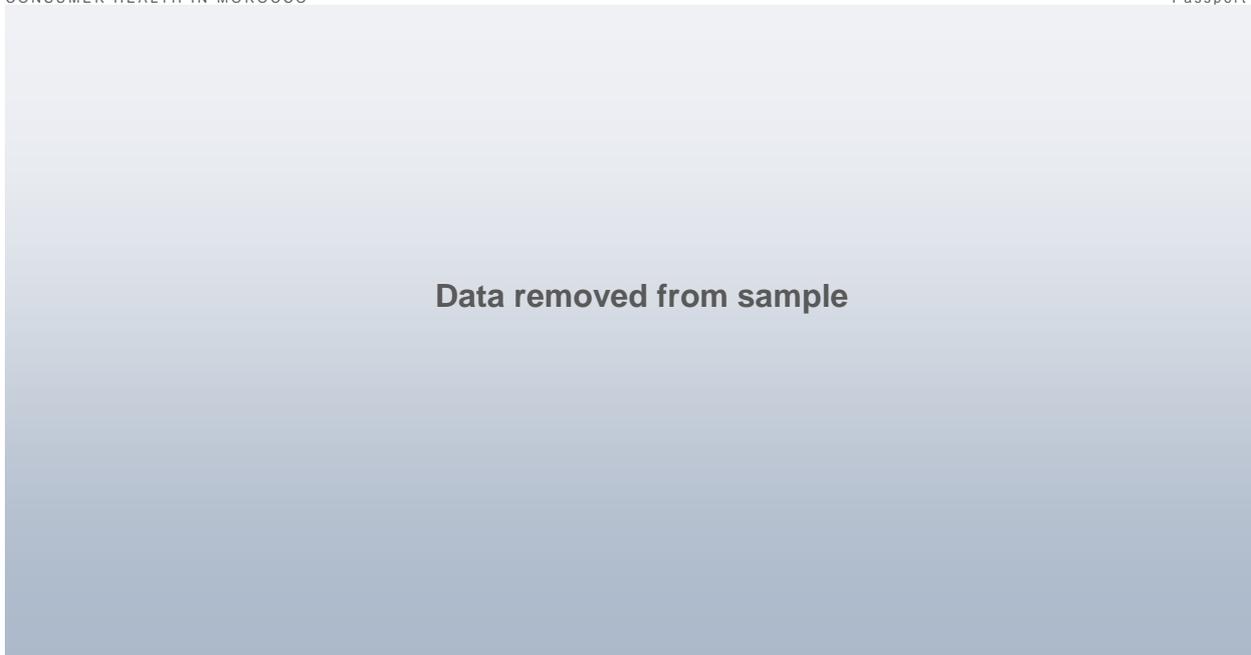


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Consumer Health: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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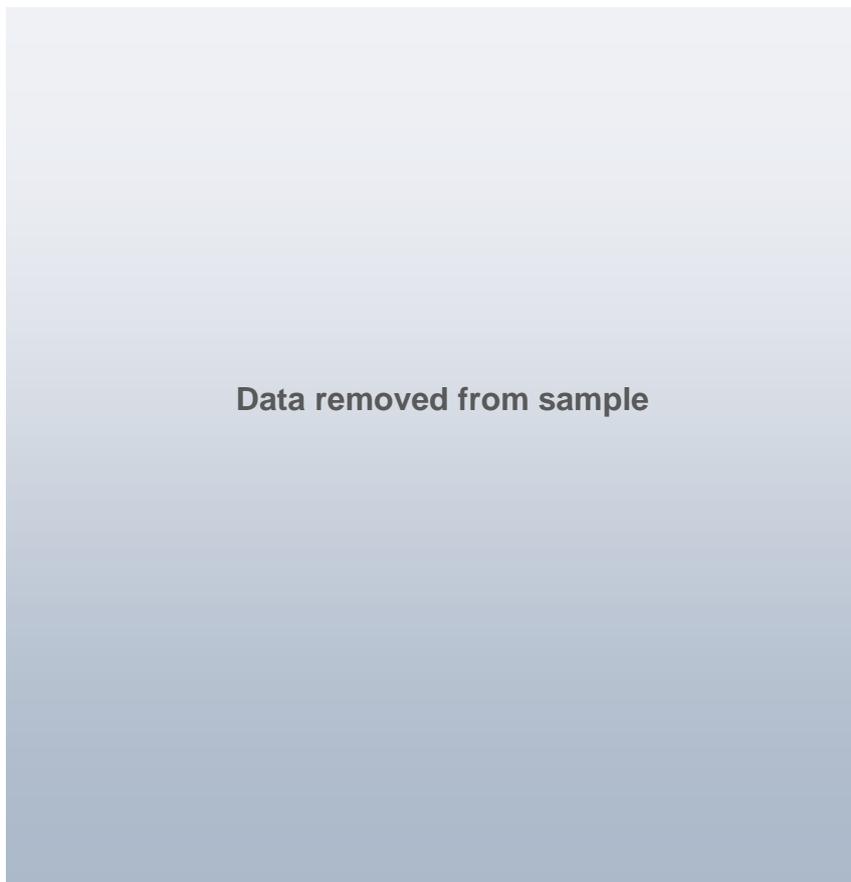


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

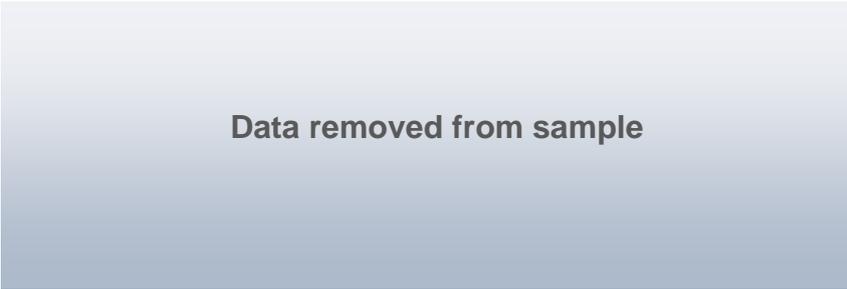
Table 7 Distribution of Consumer Health by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and



- Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



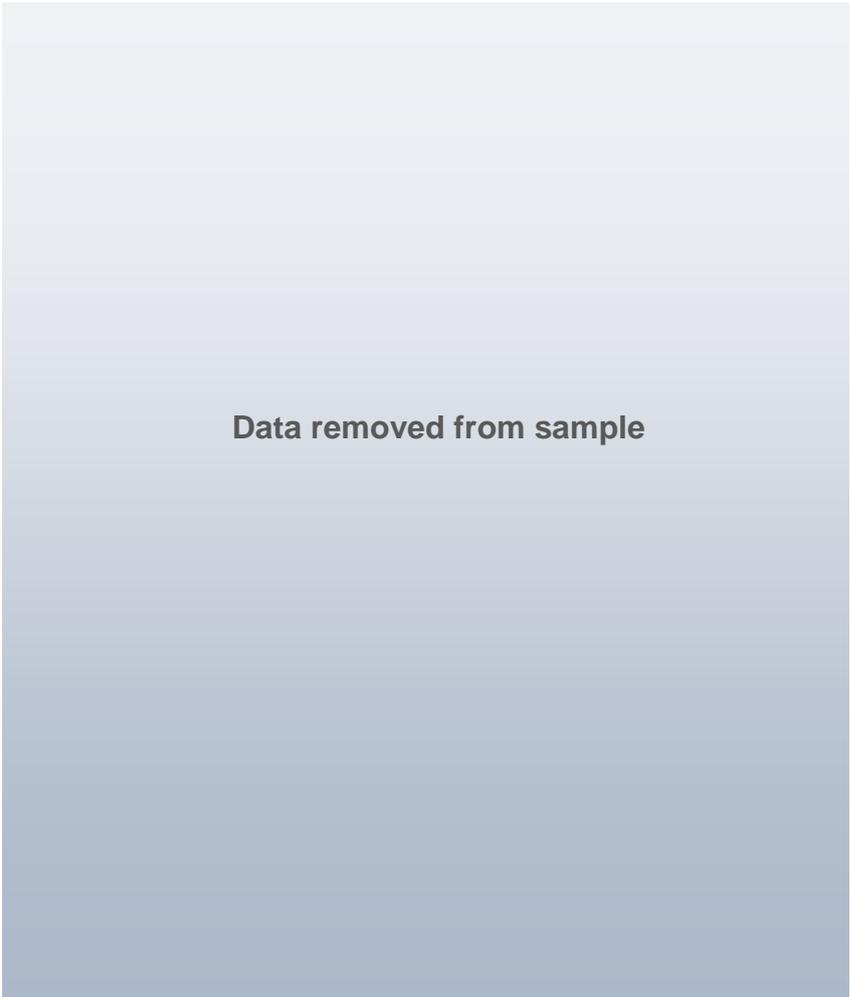
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Distribution of Consumer Health by Format and Category: % Value 2021

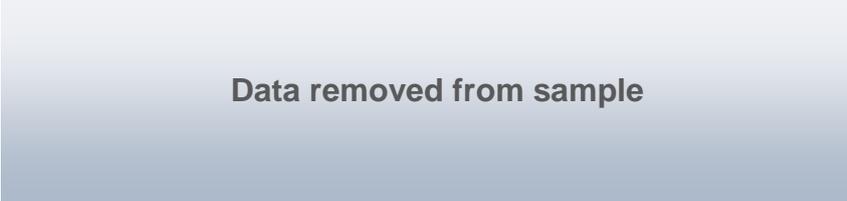
% retail value rsp

OTC	Sports Nutrition	Vitamins and Dietary Supplements	Weight Management and Wellbeing	Herbal/ Traditional Products	Allergy Care
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- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
- Other Other Grocery Retailers
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Beauty Specialist Retailers
- Chemists/Pharmacies
- Optical Goods Stores
- Drugstores/parapharmacies
- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists



- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



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- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Other Grocery Retailers
- Healthfood shops
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- Vitamins and Dietary Supplements Specialist Retailers
- Other Consumer Health Non-Grocery Specialists
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Key: OTC = over the counter; SN = sports nutrition; VDS = vitamins and dietary supplements; WMW = weight management and wellbeing; HTP = herbal/traditional products; AC = Allergy Care; PCH = paediatric consumer health

Table 9 Forecast Sales of Consumer Health by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
OTC	Data removed from sample					
Sports Nutrition						
Vitamins and Dietary Supplements						
Weight Management and Wellbeing						
Herbal/Traditional Products						
Allergy Care						
Paediatric Consumer Health						
Consumer Health						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Consumer Health by Category: % Value Growth 2021-2026

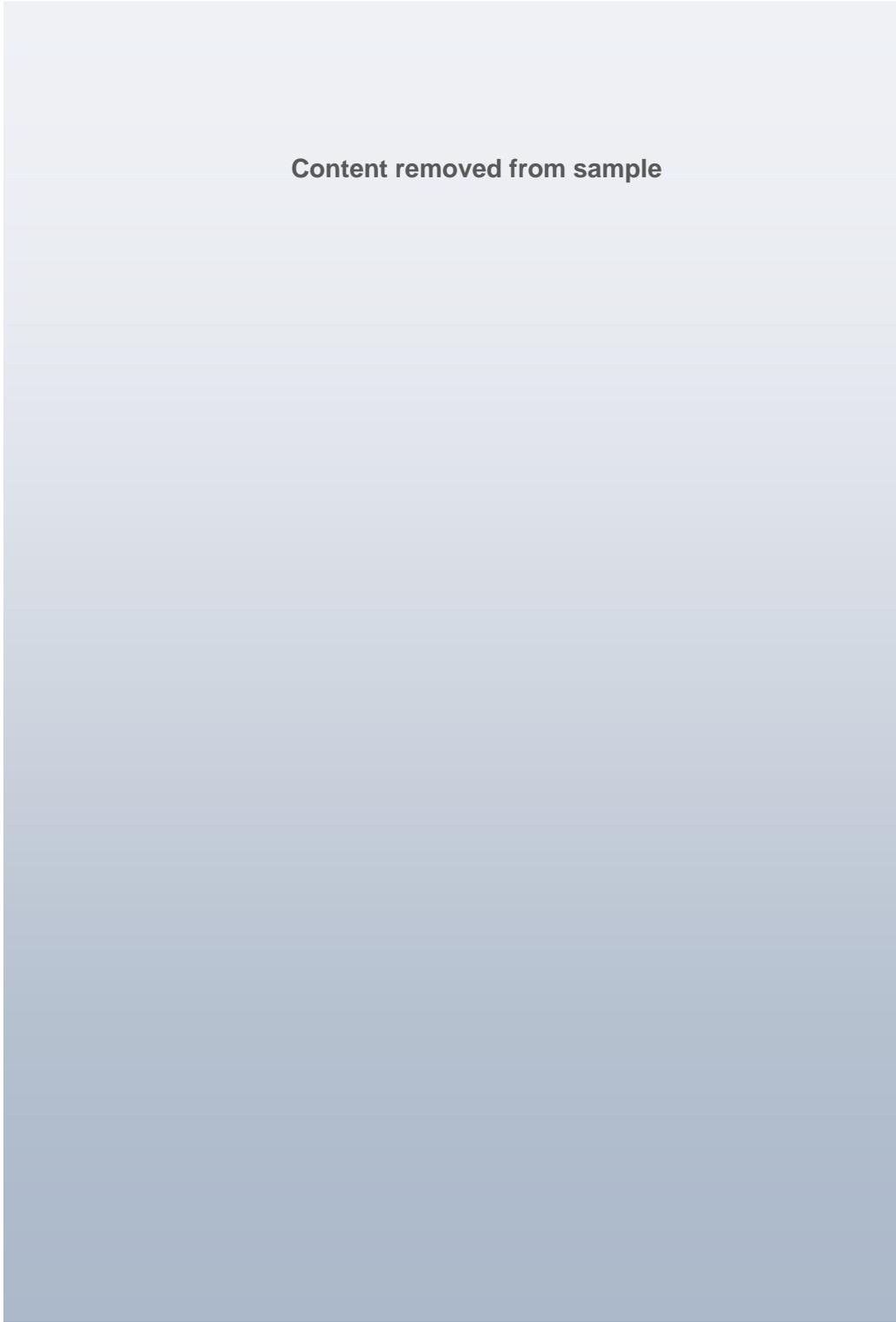
% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
OTC	Data removed from sample		
Sports Nutrition			
Vitamins and Dietary Supplements			
Weight Management and Wellbeing			
Herbal/Traditional Products			
Allergy Care			
Paediatric Consumer Health			
Consumer Health			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

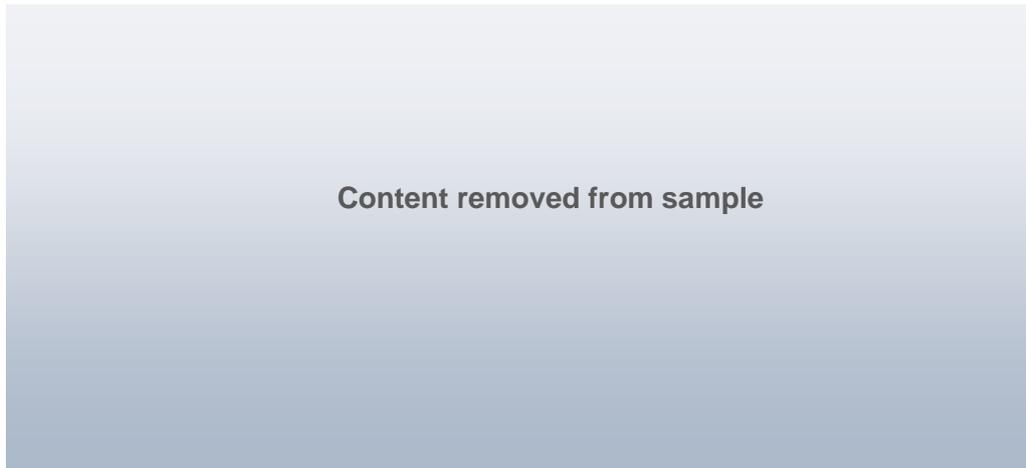
APPENDIX

OTC registration and classification

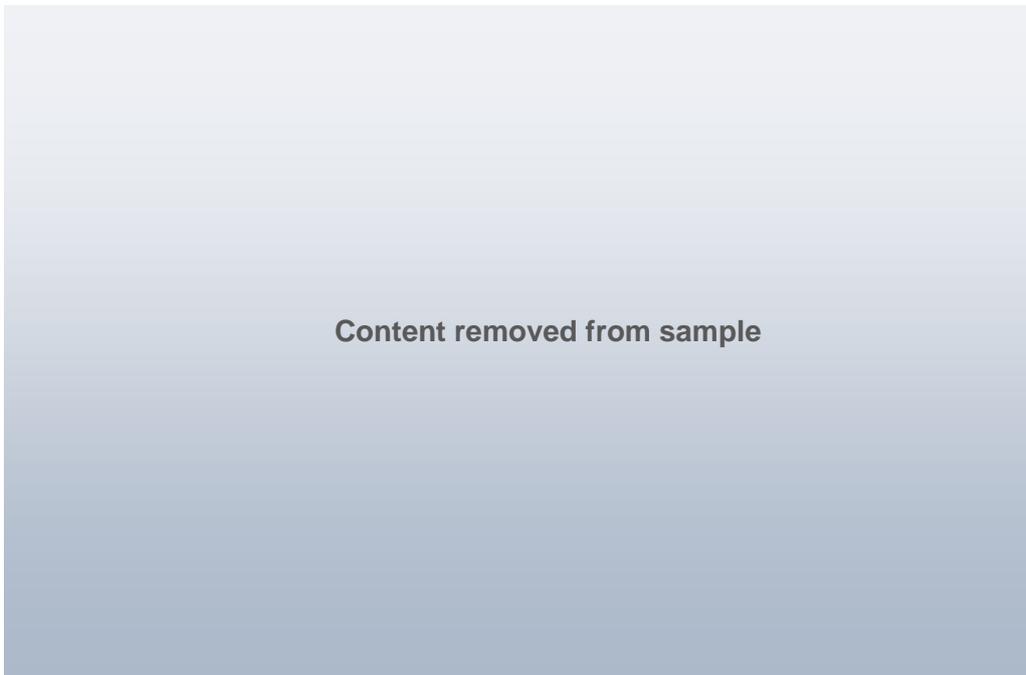
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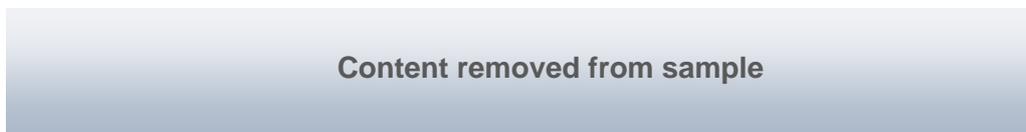
Vitamins and dietary supplements registration and classification



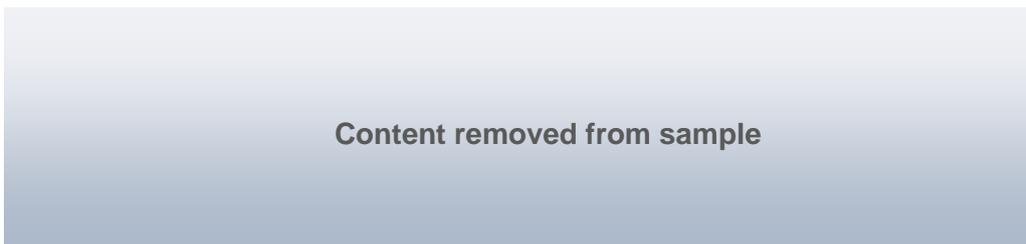
Self-medication/self-care and preventive medicine



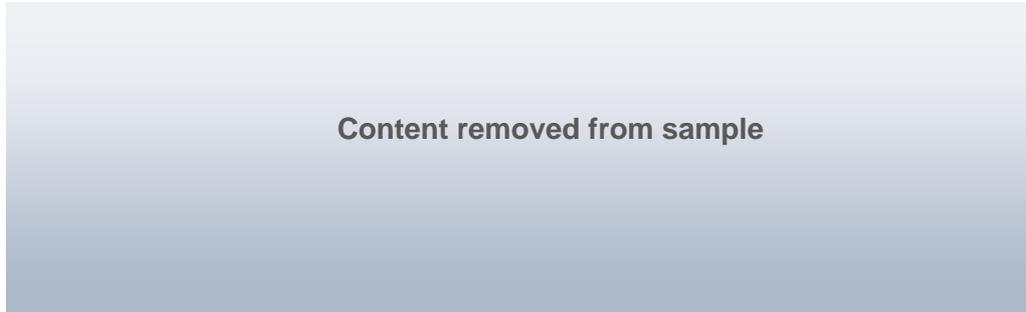
Switches



DISCLAIMER



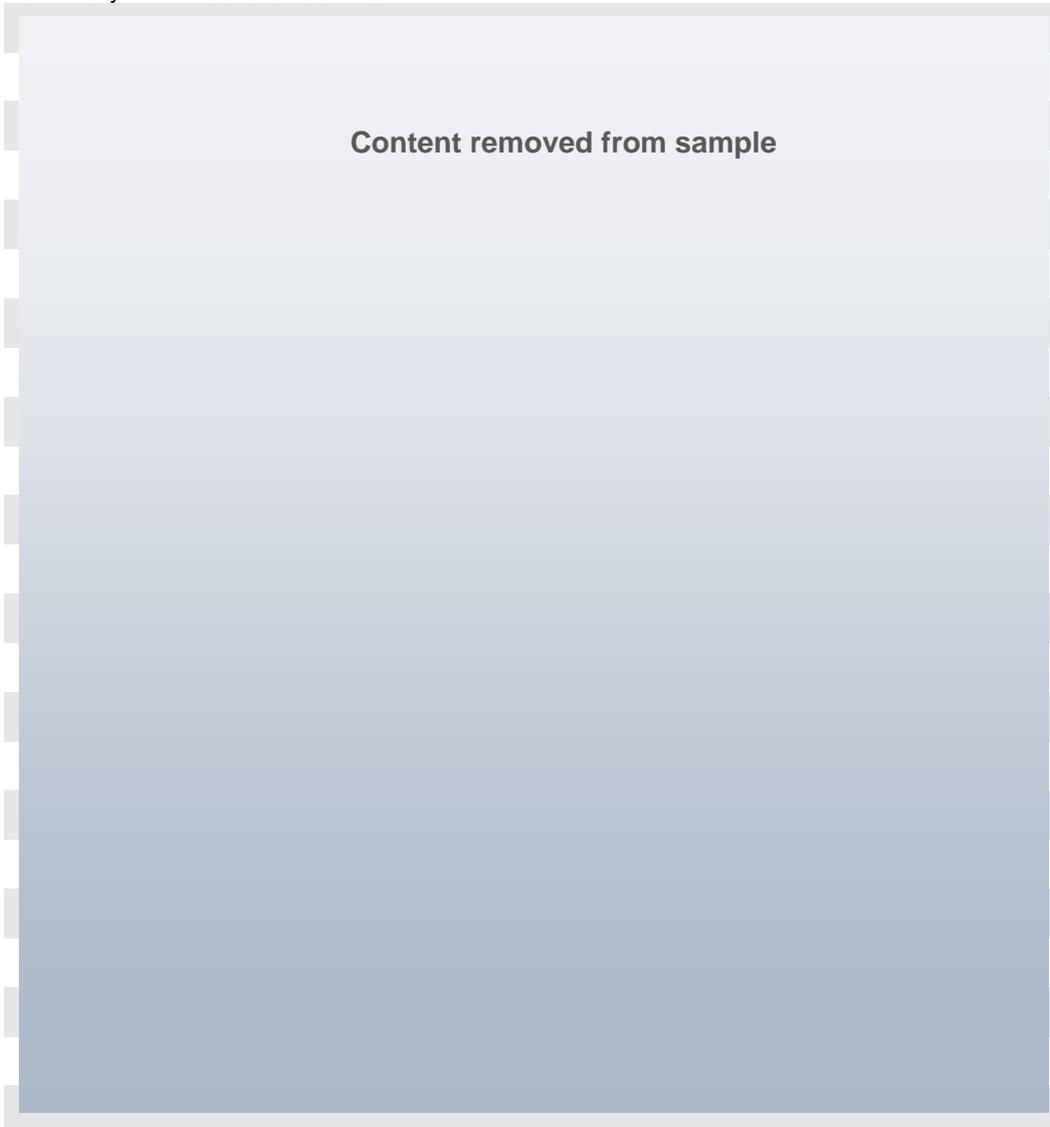
DEFINITIONS



SOURCES

Sources used during the research included the following:

Summary 1 Research Sources



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Source: Euromonitor International

ANALGESICS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

Value growth returns to more normal levels

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Local player Bottu continues to lead

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Ibuprofen recovers from bad press

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PROSPECTS AND OPPORTUNITIES

Social behaviour changed by COVID-19

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Generic products to benefit from government backing

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Self-medication to support growth and parapharmacies become more common

Content removed from sample

CATEGORY DATA

Table 11 Sales of Analgesics by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
- Systemic Analgesics	Data removed from sample					
-- Adult Analgesics						
--- Adult Acetaminophen						
--- Adult Aspirin						
--- Adult Combination Products - Analgesics						
--- Adult Diclofenac						
--- Adult Dipyron						
--- Adult Ibuprofen						
--- Adult Ketoprofen						
--- Adult Naproxen						
--- Adult OTC Triptans						
-- Paediatric Analgesics						
--- Paediatric Acetaminophen						
--- Paediatric Aspirin						
--- Paediatric Combination Products - Analgesics						
--- Paediatric Dipyron						
--- Paediatric Ibuprofen						
--- Paediatric Naproxen						
-- Adult and Paediatric Systemic Analgesics						
--- Acetaminophen						
--- Aspirin						
--- Combination Products - Analgesics						
--- Diclofenac						
--- Dipyron						
--- Ibuprofen						
--- Ketoprofen						
--- Naproxen						
--- OTC Triptans						
- Topical Analgesics/ Anaesthetic Analgesics						

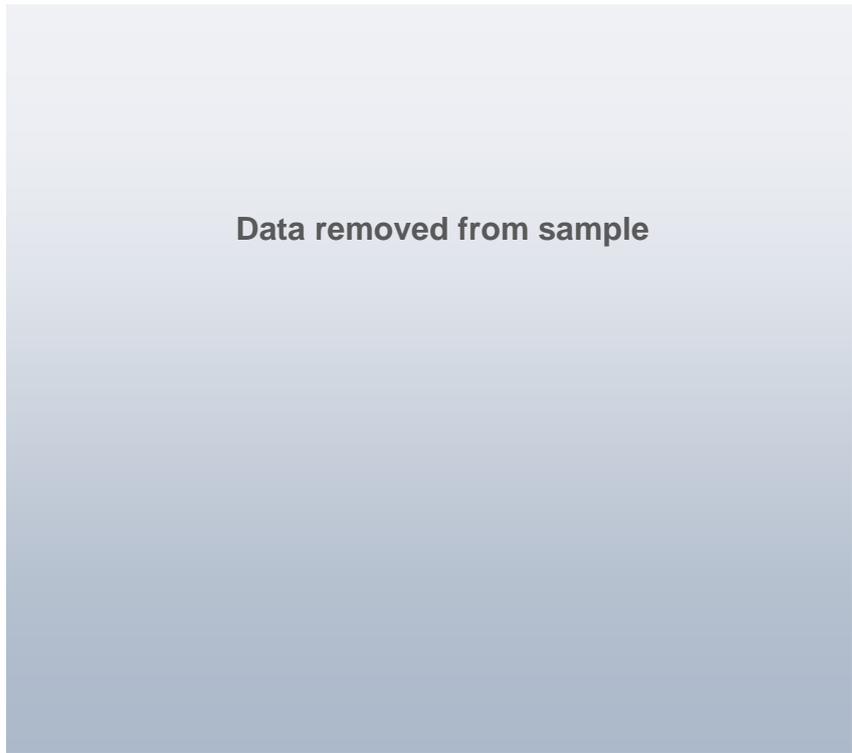
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 12 Sales of Analgesics by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Systemic Analgesics	Data removed from sample		
-- Adult Analgesics			
--- Adult Acetaminophen			
--- Adult Aspirin			
--- Adult Combination Products -			

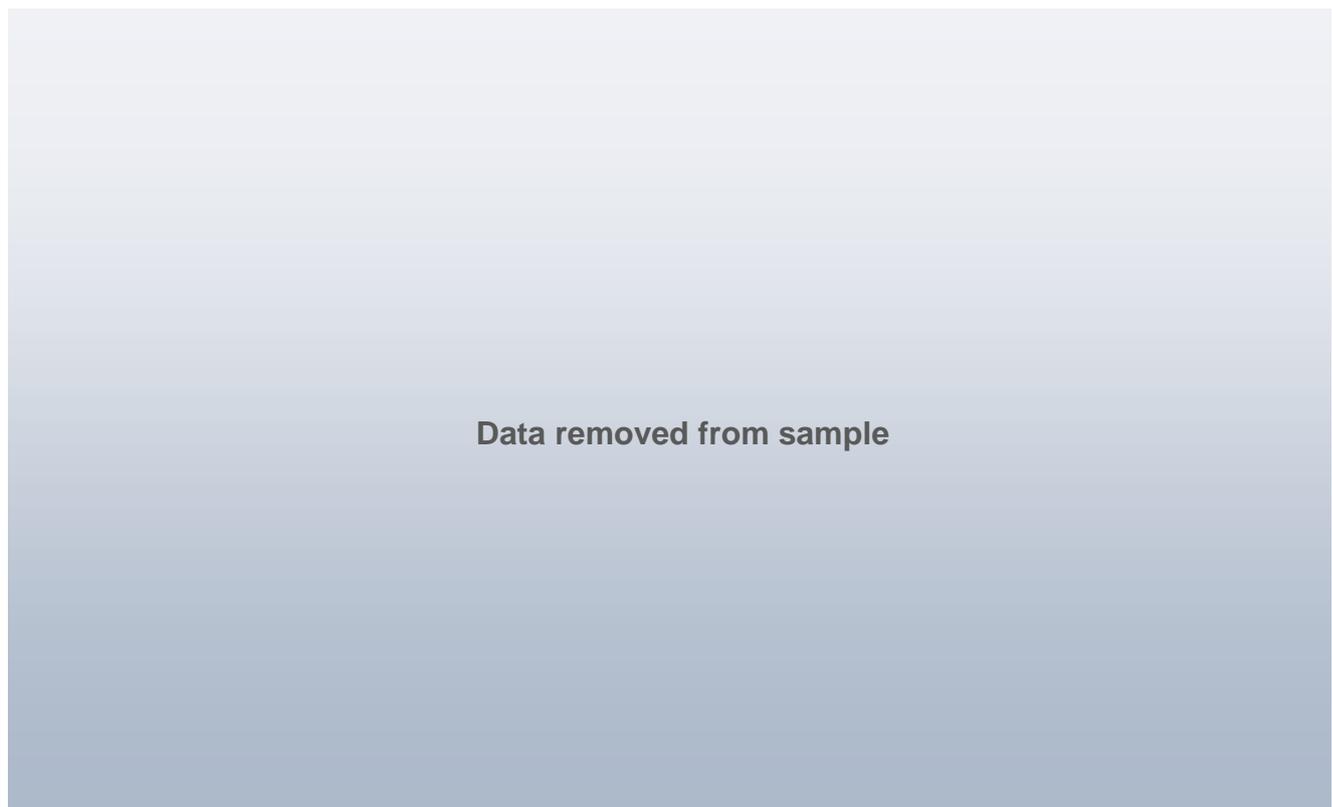
- Analgesics
- Adult Diclofenac
- Adult Dipyrene
- Adult Ibuprofen
- Adult Ketoprofen
- Adult Naproxen
- Adult OTC Triptans
- Paediatric Analgesics
- Paediatric Acetaminophen
- Paediatric Aspirin
- Paediatric Combination Products - Analgesics
- Paediatric Dipyrene
- Paediatric Ibuprofen
- Paediatric Naproxen
- Adult and Paediatric Systemic Analgesics
- Acetaminophen
- Aspirin
- Combination Products - Analgesics
- Diclofenac
- Dipyrene
- Ibuprofen
- Ketoprofen
- Naproxen
- OTC Triptans
- Topical Analgesics/Anaesthetic Analgesics

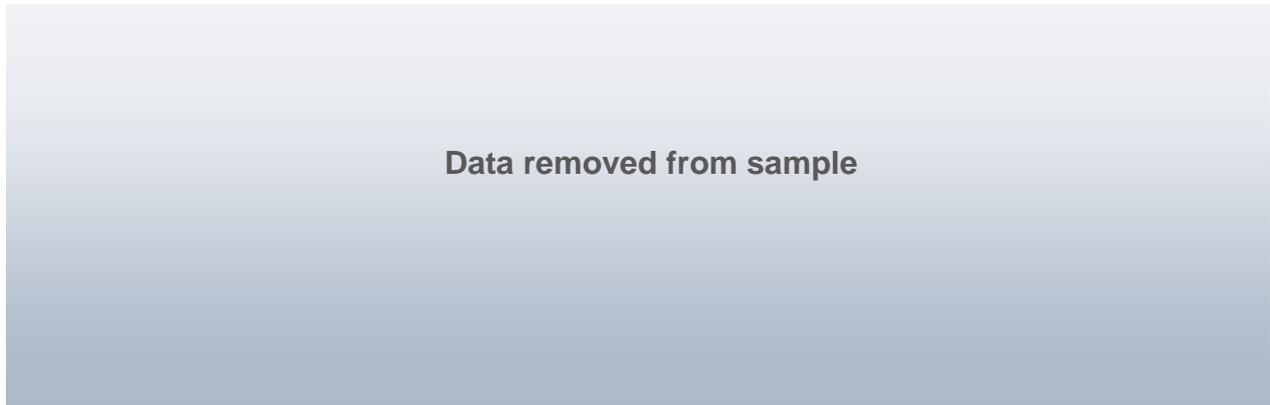


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 13 NBO Company Shares of Analgesics: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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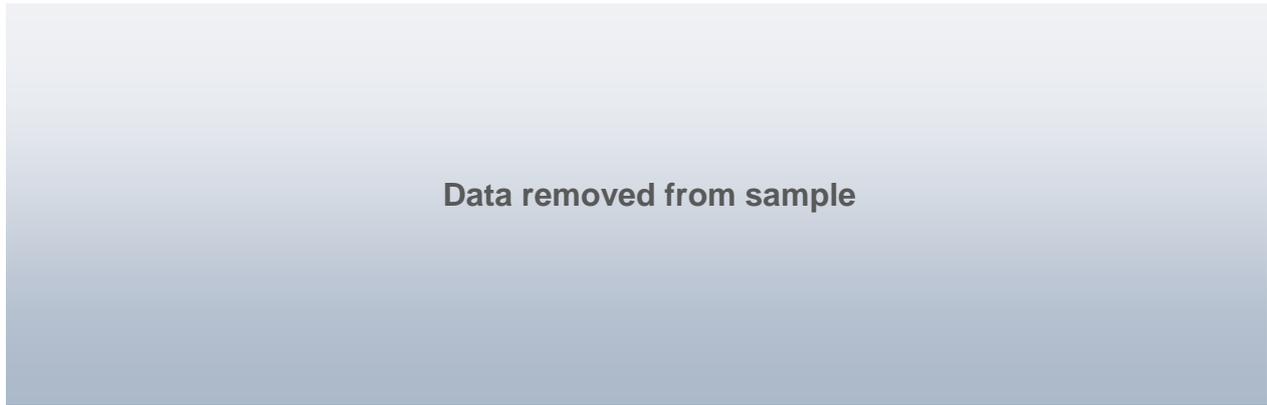


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 LBN Brand Shares of Analgesics: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------





Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 Forecast Sales of Analgesics by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
- Systemic Analgesics	Data removed from sample					
-- Adult Analgesics						
--- Adult Acetaminophen						
--- Adult Aspirin						
--- Adult Combination Products - Analgesics						
--- Adult Diclofenac						
--- Adult Dipyron						
--- Adult Ibuprofen						
--- Adult Ketoprofen						
--- Adult Naproxen						
--- Adult OTC Triptans						
-- Paediatric Analgesics						
--- Paediatric Acetaminophen						
--- Paediatric Aspirin						
--- Paediatric Combination Products - Analgesics						
--- Paediatric Dipyron						
--- Paediatric Ibuprofen						
--- Paediatric Naproxen						
-- Adult and Paediatric Systemic Analgesics						
--- Acetaminophen						
--- Aspirin						
--- Combination Products - Analgesics						
--- Diclofenac						
--- Dipyron						
--- Ibuprofen						
--- Ketoprofen						
--- Naproxen						
--- OTC Triptans						
- Topical Analgesics/						

Anaesthetic
Analgesics

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 16 Forecast Sales of Analgesics by Category: % Value Growth 2021-2026

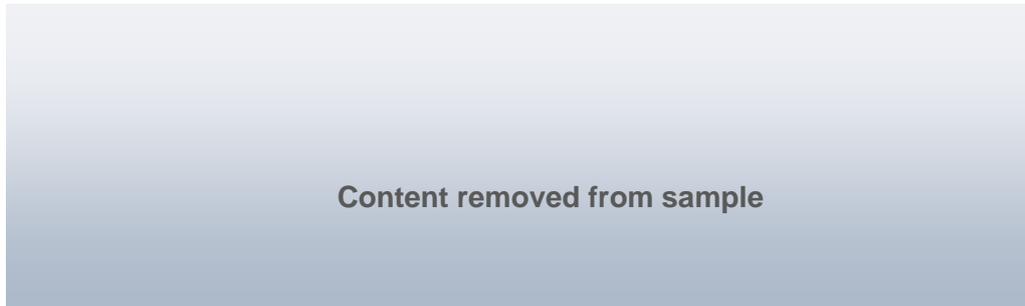
% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Systemic Analgesics	Data removed from sample		
-- Adult Analgesics			
--- Adult Acetaminophen			
--- Adult Aspirin			
--- Adult Combination Products - Analgesics			
--- Adult Diclofenac			
--- Adult Dipyron			
--- Adult Ibuprofen			
--- Adult Ketoprofen			
--- Adult Naproxen			
--- Adult OTC Triptans			
-- Paediatric Analgesics			
--- Paediatric Acetaminophen			
--- Paediatric Aspirin			
--- Paediatric Combination Products - Analgesics			
--- Paediatric Dipyron			
--- Paediatric Ibuprofen			
--- Paediatric Naproxen			
-- Adult and Paediatric Systemic Analgesics			
--- Acetaminophen			
--- Aspirin			
--- Combination Products - Analgesics			
--- Diclofenac			
--- Dipyron			
--- Ibuprofen			
--- Ketoprofen			
--- Naproxen			
--- OTC Triptans			
- Topical Analgesics/Anaesthetic Analgesics			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

SLEEP AIDS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

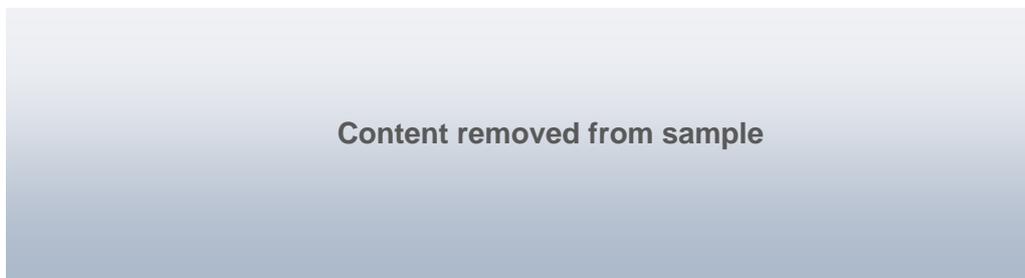


2021 DEVELOPMENTS

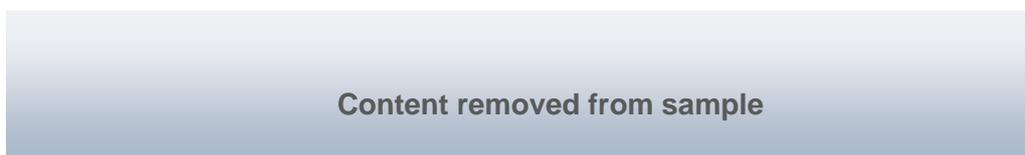
Value growth returns to more normal levels



Sothema to retain leadership thanks to affordable brands as second-place Maphar also increases share



Traditional herbal products popular in Morocco



PROSPECTS AND OPPORTUNITIES

Moroccans less wary of sleeps aids over forecast period

Content removed from sample

Consumers look for natural ingredients

Content removed from sample

Doctors can be an effective marketing tool to propel the sales of sleep aids

Content removed from sample

CATEGORY DATA

Table 17 Sales of Sleep Aids: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
Sleep Aids	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

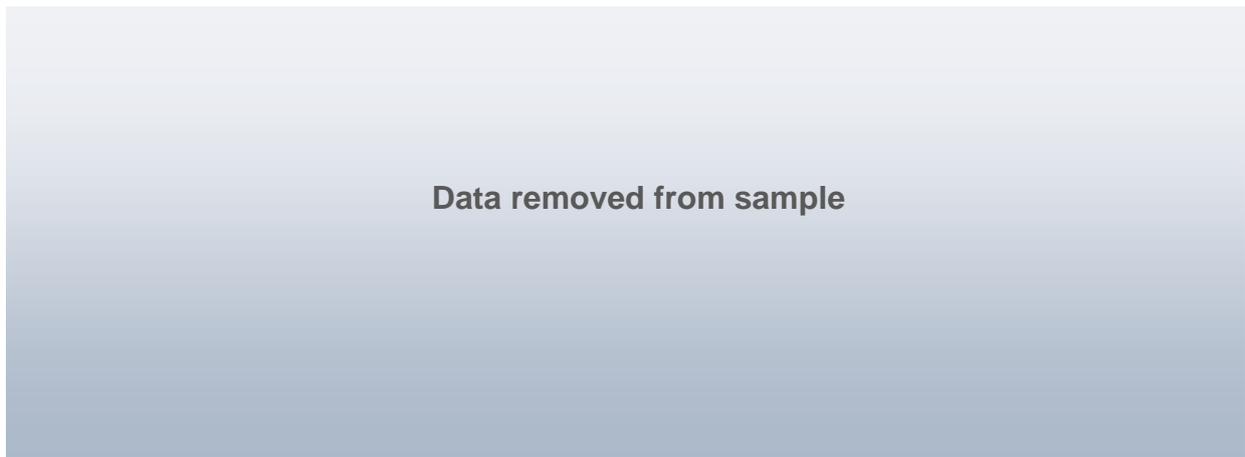
Table 18 Sales of Sleep Aids: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Sleep Aids	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 19 NBO Company Shares of Sleep Aids: % Value 2017-2021

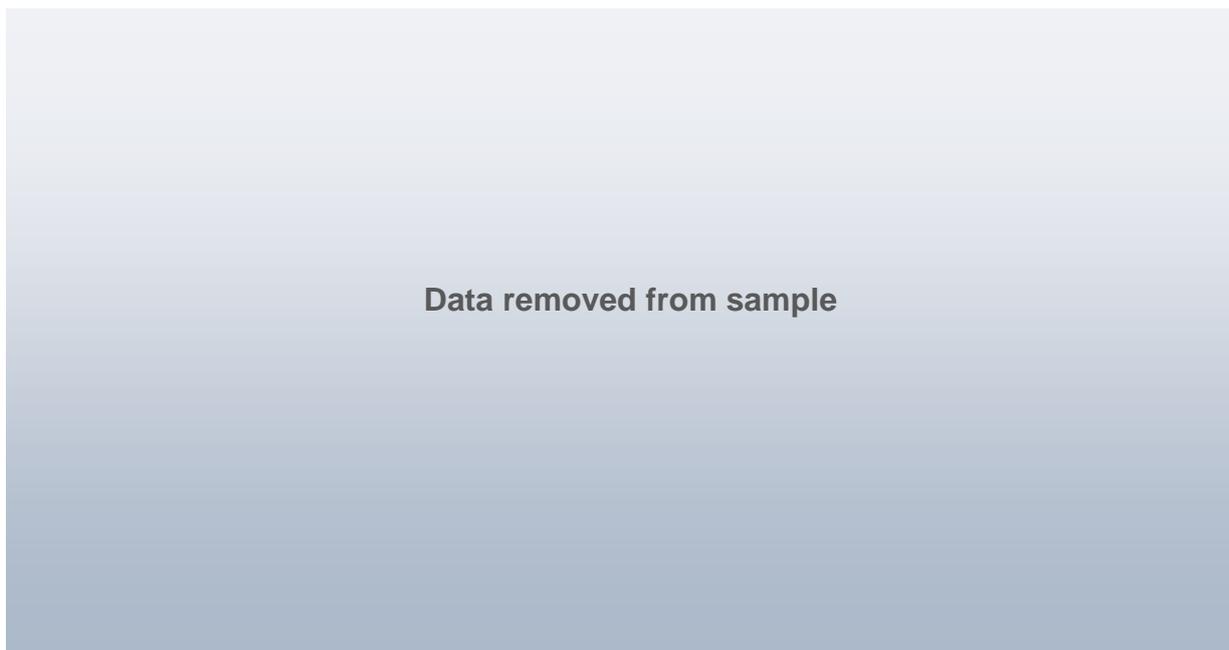
% retail value rsp Company	2017	2018	2019	2020	2021



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 LBN Brand Shares of Sleep Aids: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 21 Forecast Sales of Sleep Aids: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

Sleep Aids

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 22 Forecast Sales of Sleep Aids: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

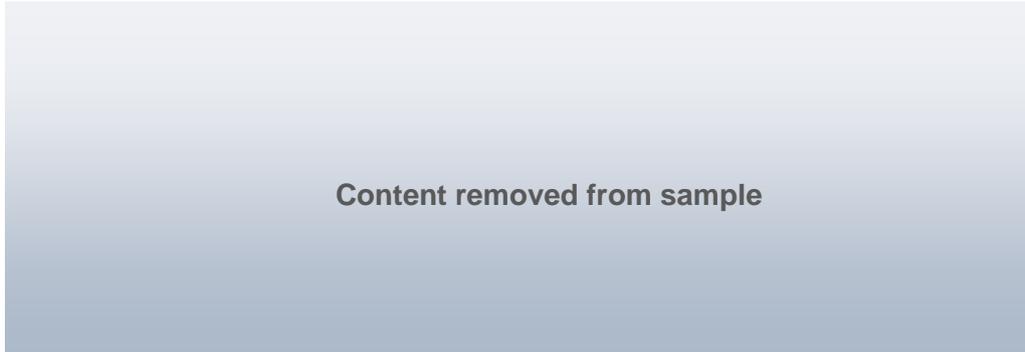
Sleep Aids

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

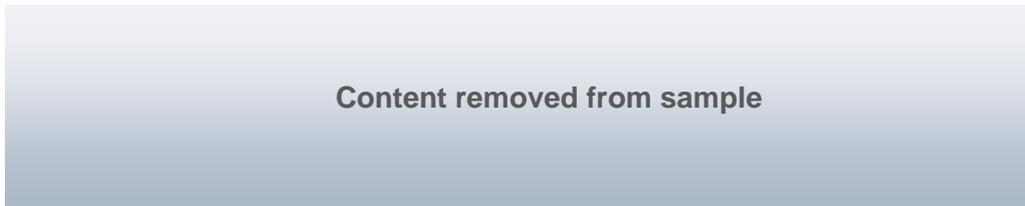
COUGH, COLD AND ALLERGY (HAY FEVER) REMEDIES IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

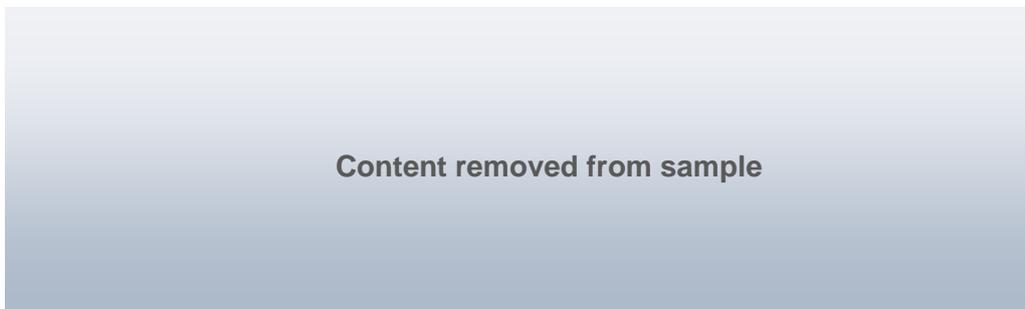


2021 DEVELOPMENTS

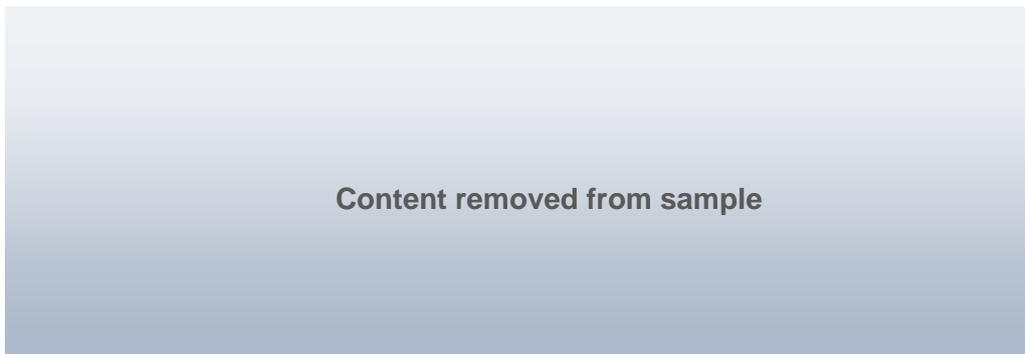
Consumers using up excess supplies



Galenica Laboratoires SA retains leadership despite increasing pressure from generics

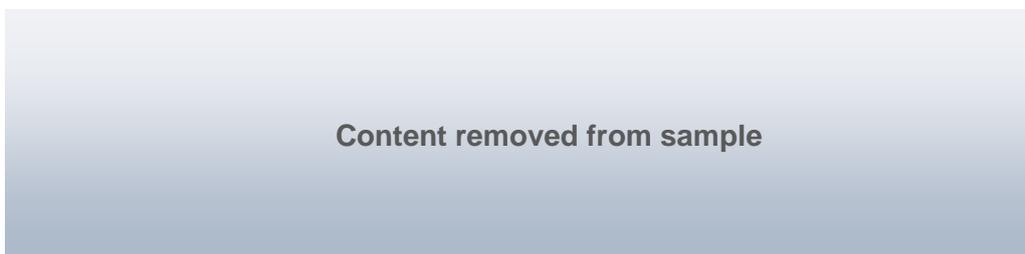


pharmaceutical manufacturing

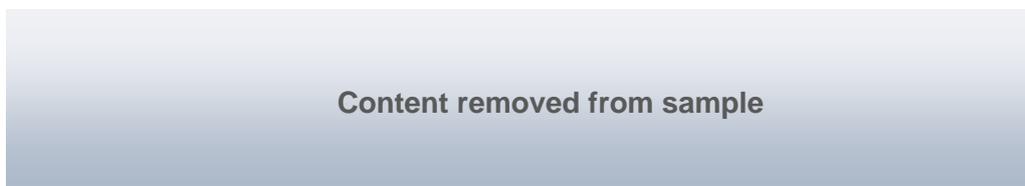


PROSPECTS AND OPPORTUNITIES

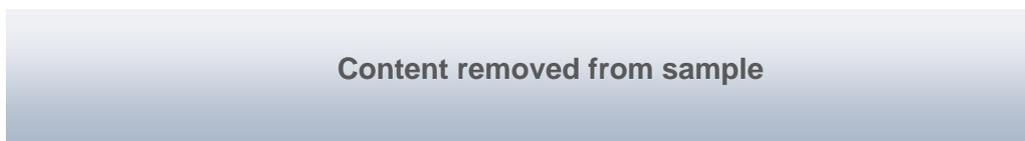
Normalisation of public life maintains value sales



Antihistamines/allergy remedies register higher growth



Self-medication growing as Moroccan consumers become more comfortable with OTC products



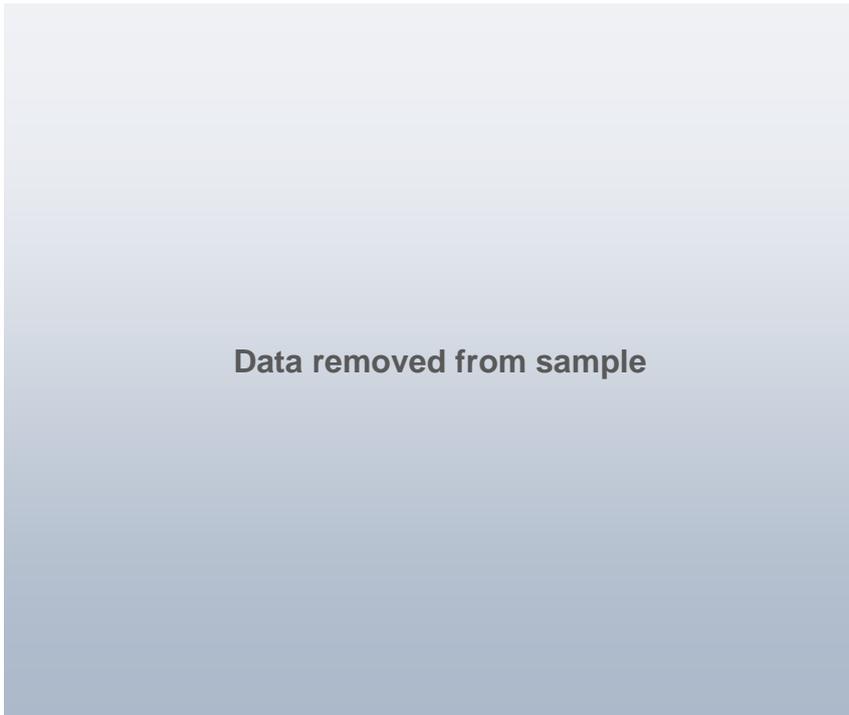
CATEGORY DATA

Table 23 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
--	------	------	------	------	------	------

- Antihistamines/
Allergy Remedies
(Systemic)
- Paediatric Cough,
Cold and Allergy Remedies
- Paediatric Allergy
Remedies
- Paediatric Cough/
Cold Remedies
- Combination Products -
Cough, Cold and Allergy
(Hay Fever) Remedies
- Cough Remedies
- Nasal Sprays
- Oral Decongestants
- Inhalant Decongestants
- Decongestant Rubs
- Nasal Decongestant
Drops
- Nasal Decongestant
Plasters
- Decongestants
- Medicated Confectionery
- Pharyngeal Preparations
- Cough, Cold and Allergy
(Hay Fever) Remedies



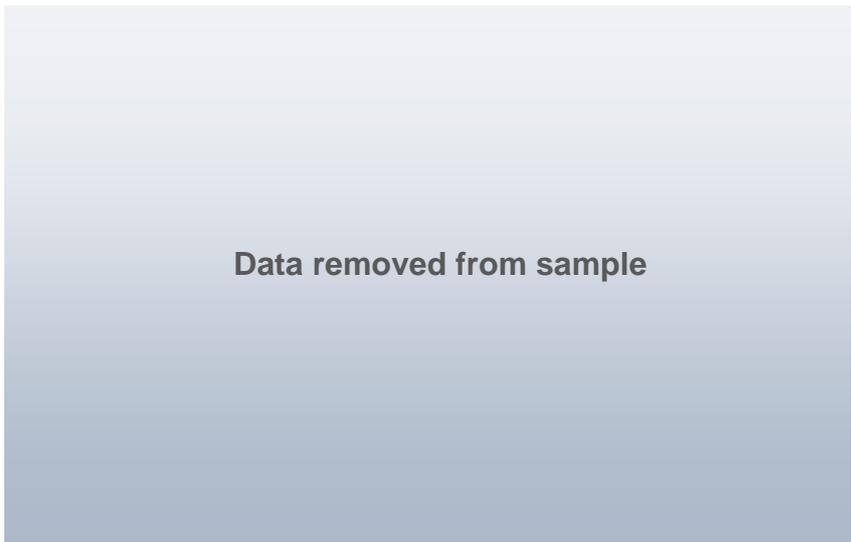
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 24 Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Antihistamines/Allergy Remedies
(Systemic)
- Paediatric Cough, Cold and Allergy
Remedies
- Paediatric Allergy Remedies
- Paediatric Cough/Cold Remedies
- Combination Products - Cough, Cold
and Allergy (Hay Fever) Remedies
- Cough Remedies
- Nasal Sprays
- Oral Decongestants
- Inhalant Decongestants
- Decongestant Rubs
- Nasal Decongestant Drops
- Nasal Decongestant Plasters
- Decongestants
- Medicated Confectionery
- Pharyngeal Preparations
- Cough, Cold and Allergy (Hay Fever)
Remedies



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 25 NBO Company Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

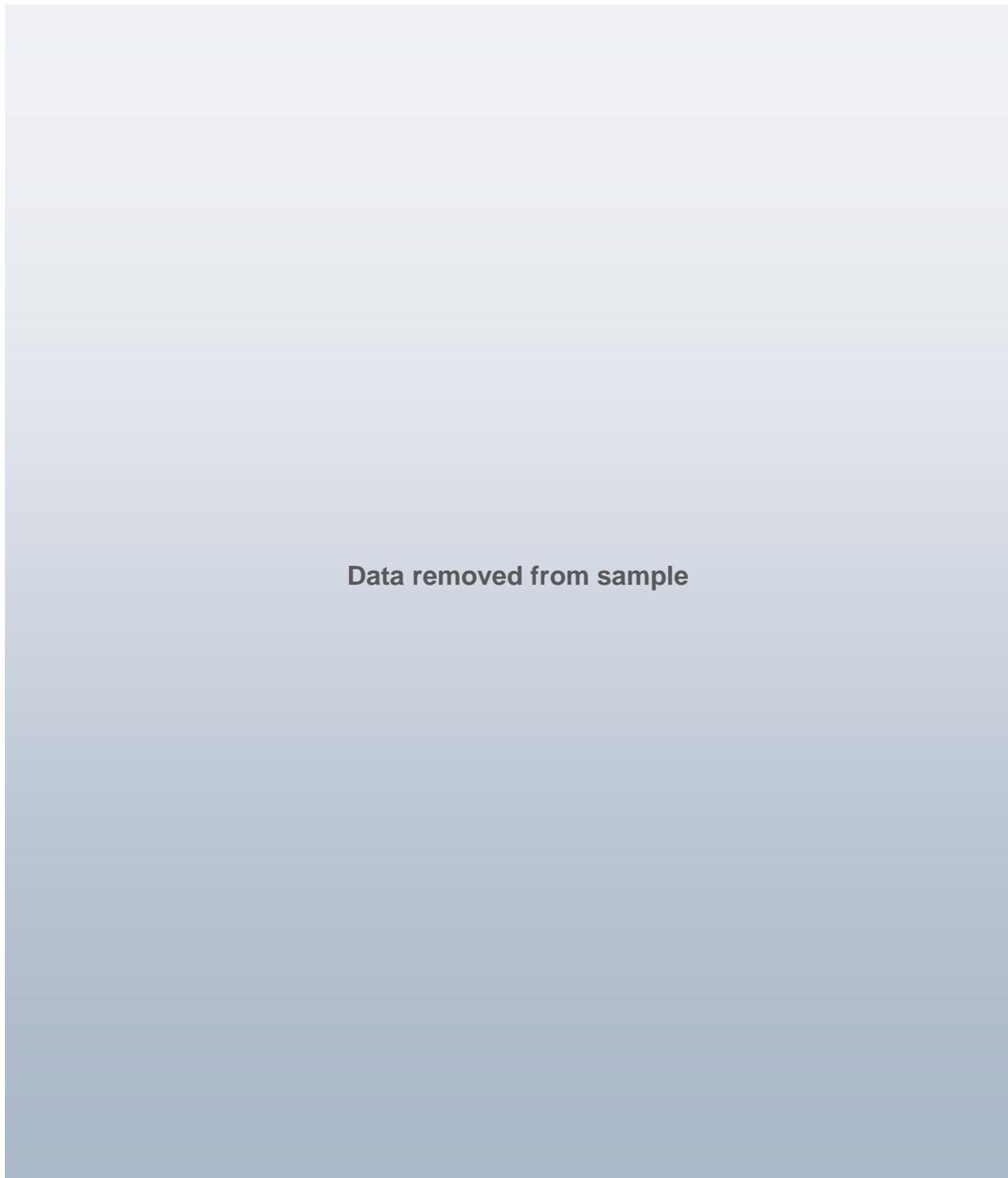
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 LBN Brand Shares of Cough, Cold and Allergy (Hay Fever) Remedies: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

**Table 27 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category:
Value 2021-2026**

MAD million

	2021	2022	2023	2024	2025	2026
- Antihistamines/ Allergy Remedies (Systemic)	Data removed from sample					
- Paediatric Cough, Cold and Allergy Remedies						
-- Paediatric Allergy Remedies						
-- Paediatric Cough/ Cold Remedies						
- Combination Products - Cough, Cold and Allergy (Hay Fever) Remedies						
- Cough Remedies						
-- Nasal Sprays						
-- Oral Decongestants						
-- Inhalant Decongestants						
-- Decongestant Rubs						
-- Nasal Decongestant Drops						
-- Nasal Decongestant Plasters						
- Decongestants						
- Medicated Confectionery						
- Pharyngeal Preparations Cough, Cold and Allergy (Hay Fever) Remedies						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

**Table 28 Forecast Sales of Cough, Cold and Allergy (Hay Fever) Remedies by Category:
% Value Growth 2021-2026**

% constant value growth

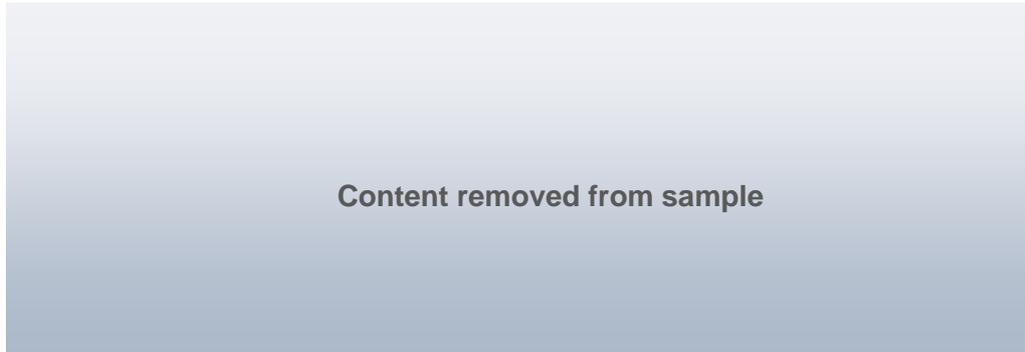
	2021/2022	2021-26 CAGR	2021/26 Total
- Antihistamines/Allergy Remedies (Systemic)	Data removed from sample		
- Paediatric Cough, Cold and Allergy Remedies			
-- Paediatric Allergy Remedies			
-- Paediatric Cough/Cold Remedies			
- Combination Products - Cough, Cold and Allergy (Hay Fever) Remedies			
- Cough Remedies			
-- Nasal Sprays			
-- Oral Decongestants			
-- Inhalant Decongestants			
-- Decongestant Rubs			
-- Nasal Decongestant Drops			
-- Nasal Decongestant Plasters			
- Decongestants			
- Medicated Confectionery			
- Pharyngeal Preparations Cough, Cold and Allergy (Hay Fever) Remedies			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

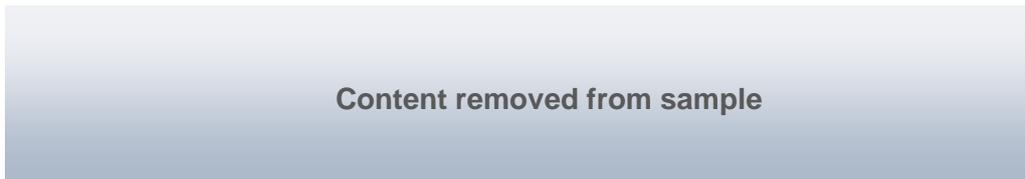
DERMATOLOGICALS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

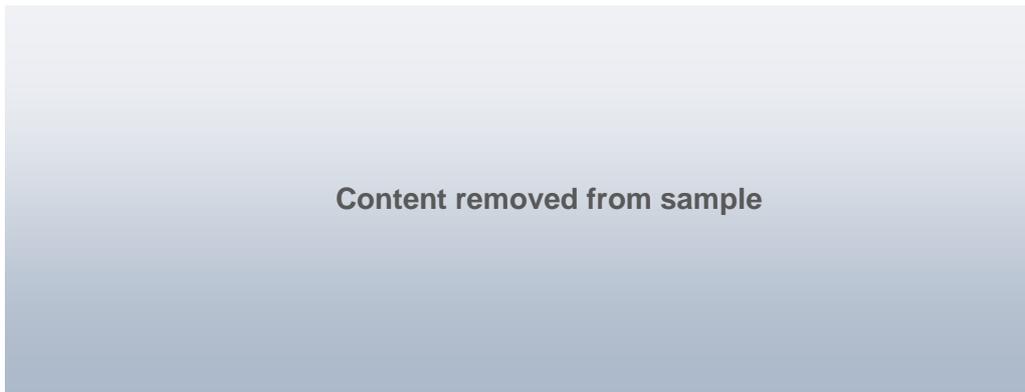


2021 DEVELOPMENTS

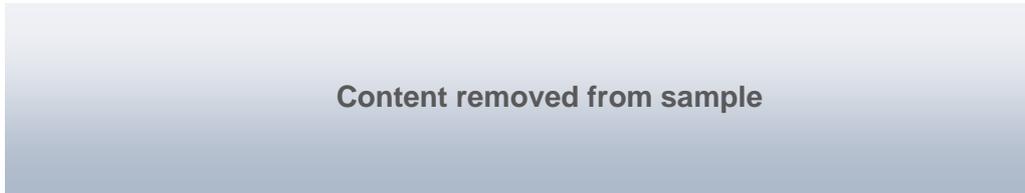
Topical germicidals/antiseptics still in demand due to frequent hand washing



Topical germicidals/antiseptics gain value share

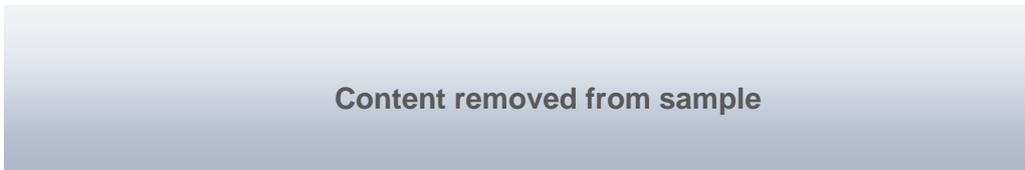


Prevalence of dermatological conditions remains high due to low hygiene standards

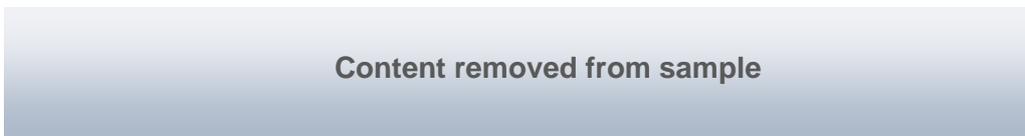


PROSPECTS AND OPPORTUNITIES

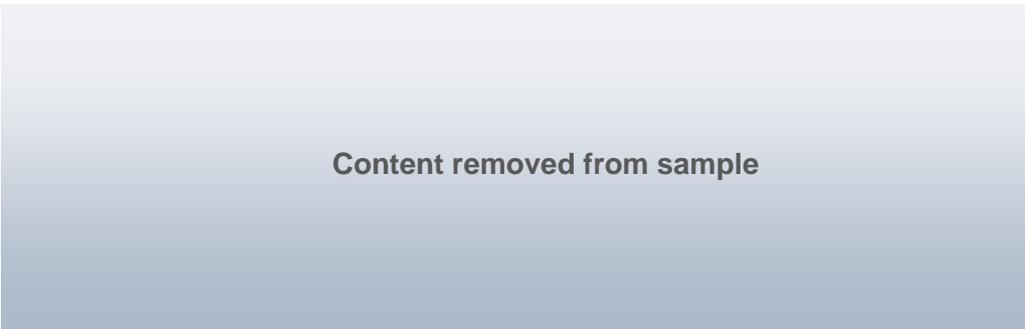
Dermatologicals largely unaffected by COVID-19 and growth continues as normal



Topical germicidals/antiseptics best performer over forecast period



Social stigma of certain products benefits online sales



CATEGORY DATA

Table 29 Sales of Dermatologicals by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

- Medicated Shampoos
- Topical Antifungals
- Vaginal Antifungals
- Hair Loss Treatments
- Nappy (Diaper) Rash Treatments
- Antiparasitics/Lice (Head and Body) Treatments
- Antipruritics
- Cold Sore Treatments
- Haemorrhoid Treatments
- Paediatric Dermatologicals
- Topical Allergy Remedies/Antihistamines
- Topical Germicidals/Antiseptics Dermatologicals



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 30 Sales of Dermatologicals by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Medicated Shampoos			
- Topical Antifungals			
- Vaginal Antifungals			
- Hair Loss Treatments			
- Nappy (Diaper) Rash Treatments			
- Antiparasitics/Lice (Head and Body) Treatments			
- Antipruritics			
- Cold Sore Treatments			
- Haemorrhoid Treatments			
- Paediatric Dermatologicals			
- Topical Allergy Remedies/Antihistamines			
- Topical Germicidals/Antiseptics Dermatologicals			

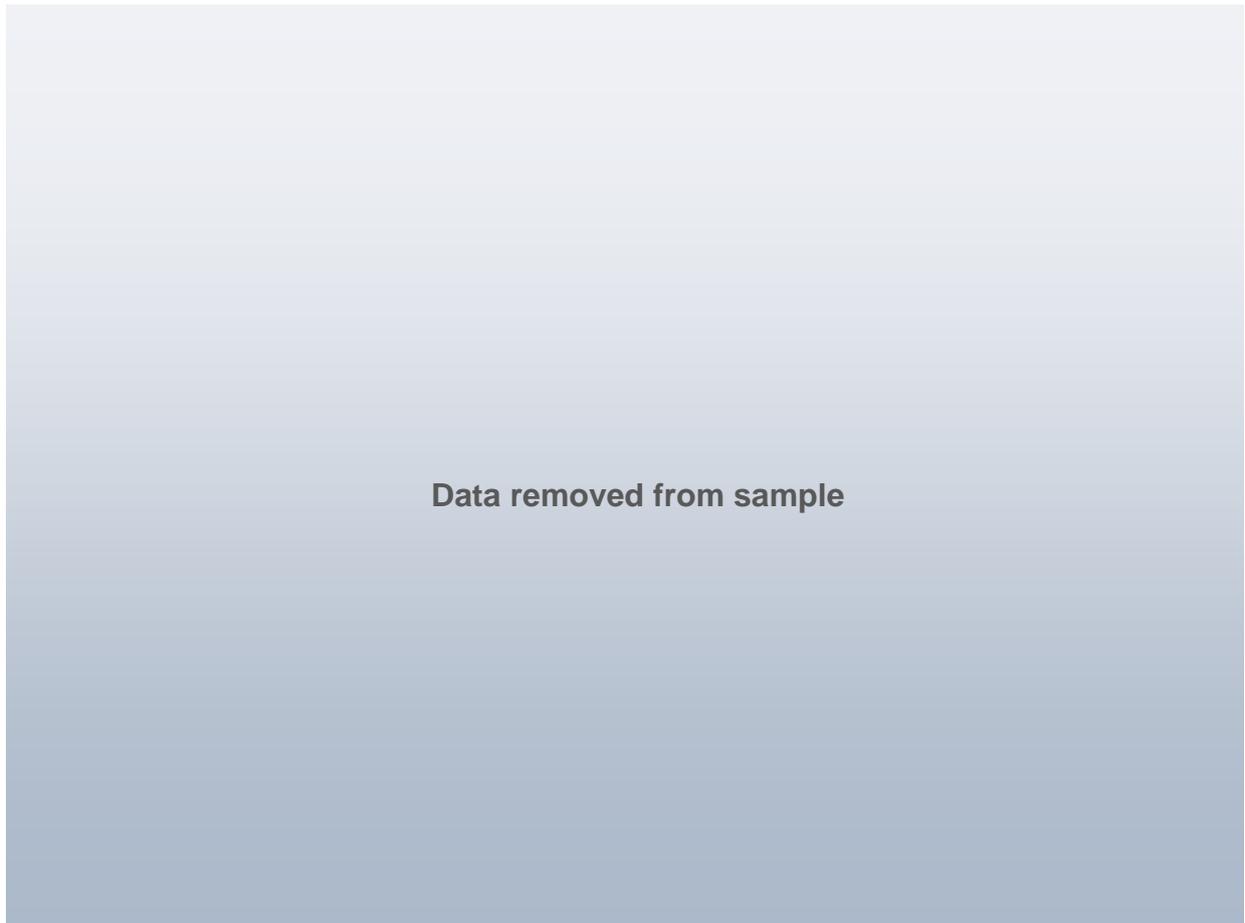


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 31 NBO Company Shares of Dermatologicals: % Value 2017-2021

% retail value rsp
Company

	2017	2018	2019	2020	2021



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 32 LBN Brand Shares of Dermatologicals: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

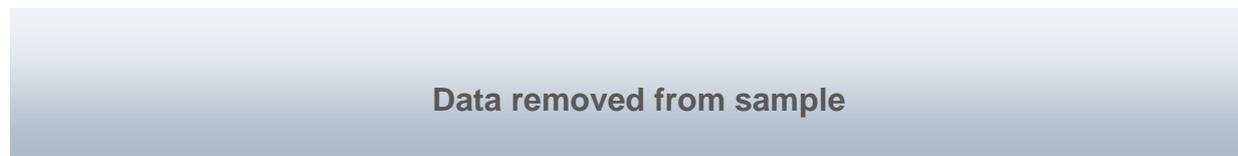




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 33 LBN Brand Shares of Hair Loss Treatments: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 34 Forecast Sales of Dermatologicals by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
<ul style="list-style-type: none"> - Medicated Shampoos - Topical Antifungals - Vaginal Antifungals - Hair Loss Treatments - Nappy (Diaper) Rash Treatments - Antiparasitics/Lice (Head and Body) Treatments - Antipruritics - Cold Sore Treatments - Haemorrhoid Treatments - Paediatric Dermatologicals - Topical Allergy Remedies/Antihistamines - Topical Germicidals/Antiseptics 	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 35 Forecast Sales of Dermatologicals by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
<ul style="list-style-type: none"> - Medicated Shampoos - Topical Antifungals - Vaginal Antifungals - Hair Loss Treatments - Nappy (Diaper) Rash Treatments - Antiparasitics/Lice (Head and Body) Treatments 	Data removed from sample		

- Antipruritics
 - Cold Sore Treatments
 - Haemorrhoid Treatments
 - Paediatric Dermatologicals
 - Topical Allergy Remedies/
Antihistamines
 - Topical Germicidals/Antiseptics
- Dermatologicals

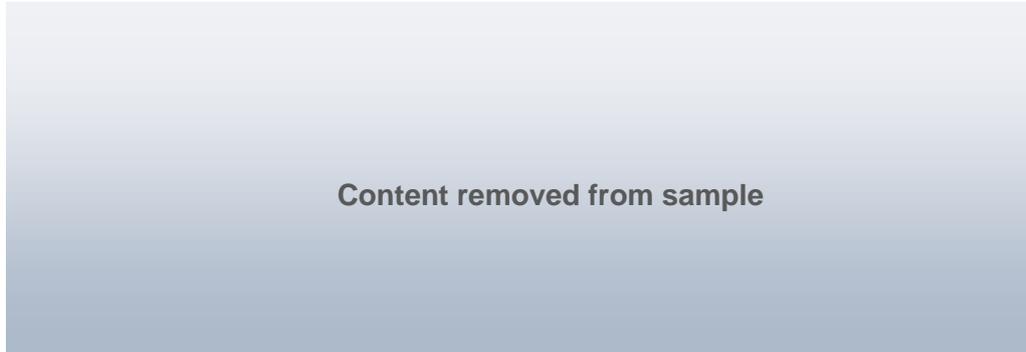
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews,
trade sources

Note: 2021 data is provisional and based on part-year estimates

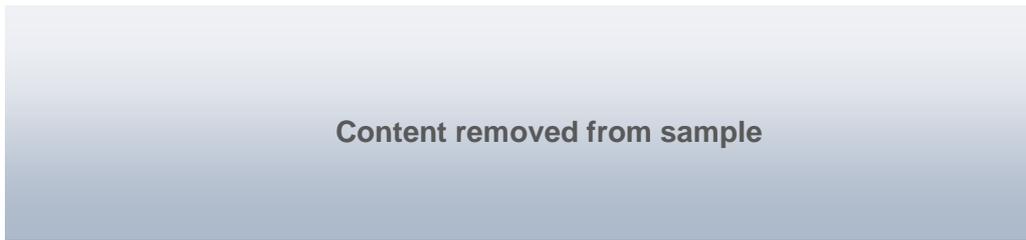
DIGESTIVE REMEDIES IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

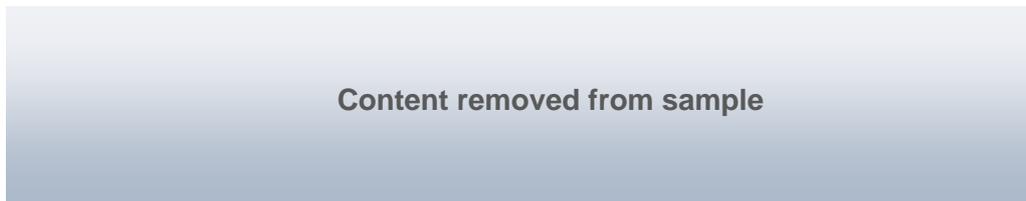


2021 DEVELOPMENTS

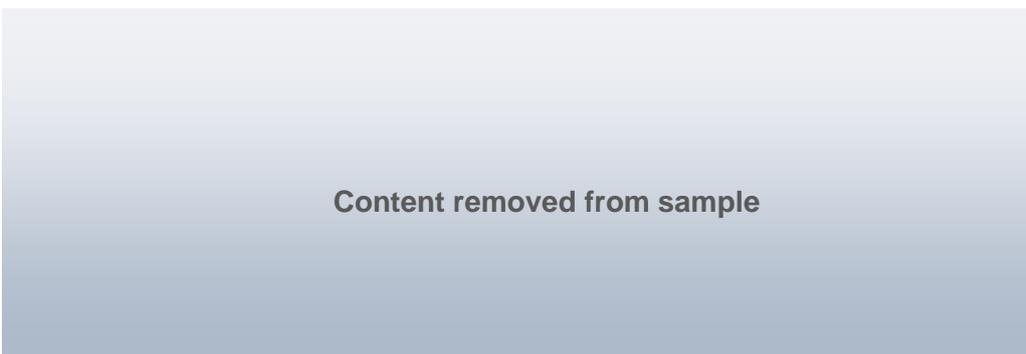
Digestive remedies largely unaffected by pandemic



Local players dominate

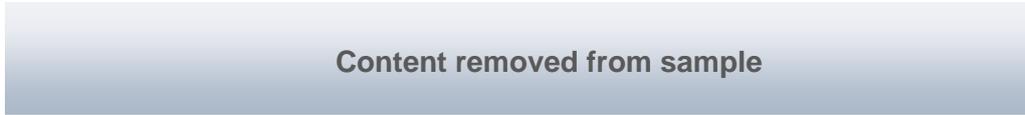


Modern lifestyles and poor diets helping digestive remedies to grow in Morocco

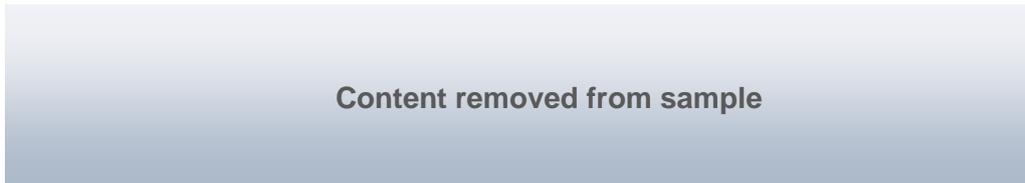


PROSPECTS AND OPPORTUNITIES

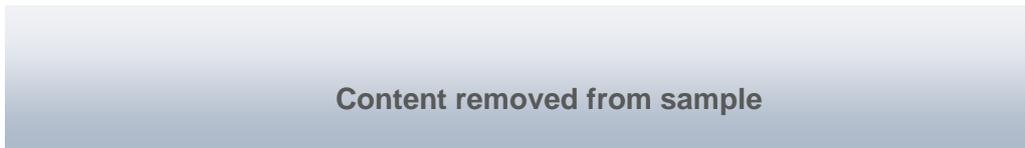
Steady growth over the forecast period



Food poisoning A common source of sales for digestive remedies



Developments in herbal products will lead the way for health-conscious consumers

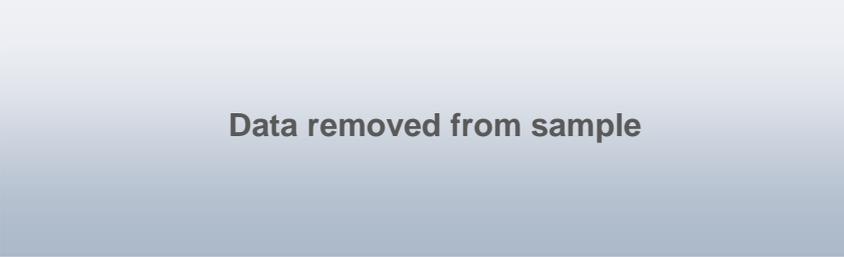


CATEGORY DATA

Table 36 Sales of Digestive Remedies by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
- Paediatric Digestive Remedies	Data removed from sample					
-- Paediatric Diarrhoeal Remedies						
-- Paediatric Indigestion and Heartburn Remedies						
-- Paediatric Laxatives						
-- Paediatric Motion Sickness Remedies						
- Diarrhoeal Remedies						
- IBS Treatments						
- Indigestion and Heartburn Remedies						
-- Antacids						

- Antiflatulents
- Digestive Enzymes
- H2 Blockers
- Proton Pump Inhibitors
- Laxatives
- Motion Sickness Remedies
- Digestive Remedies



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 37 Sales of Digestive Remedies by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- Paediatric Digestive Remedies	Data removed from sample		
-- Paediatric Diarrhoeal Remedies			
-- Paediatric Indigestion and Heartburn Remedies			
-- Paediatric Laxatives			
-- Paediatric Motion Sickness Remedies			
- Diarrhoeal Remedies			
- IBS Treatments			
- Indigestion and Heartburn Remedies			
-- Antacids			
-- Antiflatulents			
-- Digestive Enzymes			
-- H2 Blockers			
-- Proton Pump Inhibitors			
- Laxatives			
- Motion Sickness Remedies			
Digestive Remedies			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 38 NBO Company Shares of Digestive Remedies: % Value 2017-2021

% retail value rsp
 Company

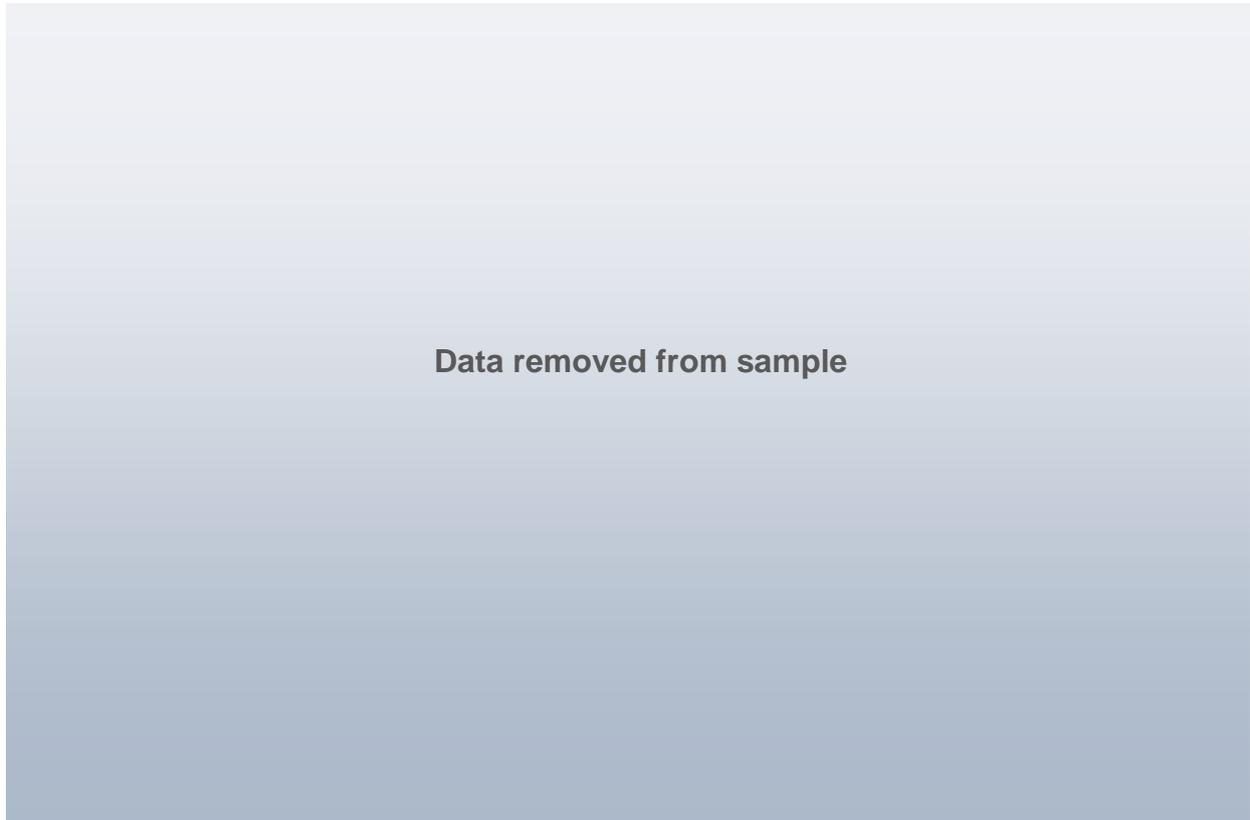
	2017	2018	2019	2020	2021
Data removed from sample					

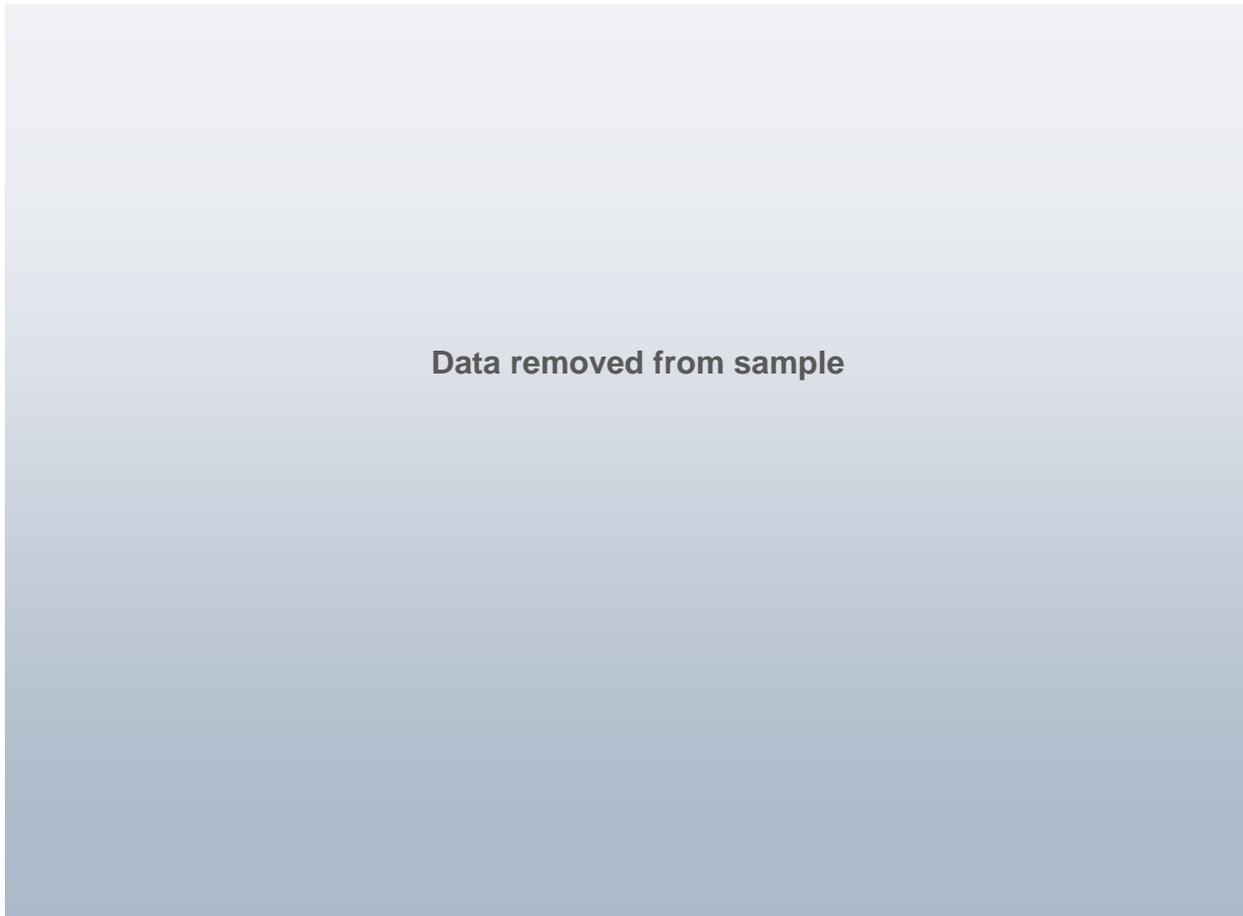


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 39 LBN Brand Shares of Digestive Remedies: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 40 Forecast Sales of Digestive Remedies by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
- Paediatric Digestive Remedies	Data removed from sample					
-- Paediatric Diarrhoeal Remedies						
-- Paediatric Indigestion and Heartburn Remedies						
-- Paediatric Laxatives						
-- Paediatric Motion Sickness Remedies						
- Diarrhoeal Remedies						
- IBS Treatments						
- Indigestion and Heartburn Remedies						
-- Antacids						
-- Antiflatulents						
-- Digestive Enzymes						
-- H2 Blockers						

- Proton Pump Inhibitors
- Laxatives
- Motion Sickness Remedies
- Digestive Remedies

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 41 Forecast Sales of Digestive Remedies by Category: % Value Growth 2021-2026

% constant value growth

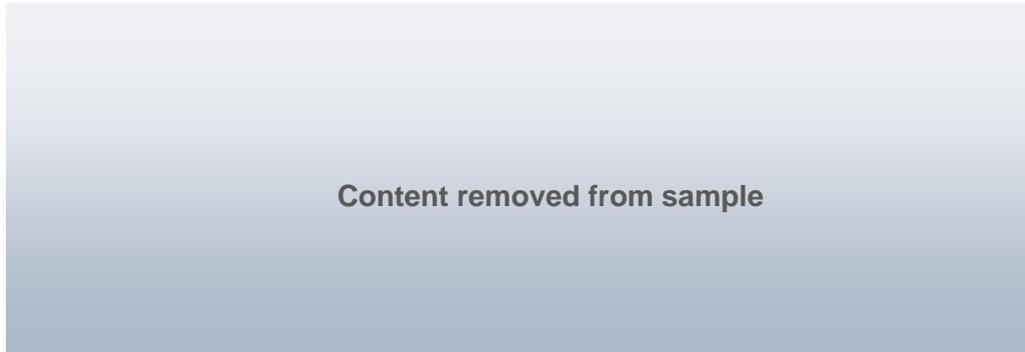
- Paediatric Digestive Remedies
- Paediatric Diarrhoeal Remedies
- Paediatric Indigestion and Heartburn Remedies
- Paediatric Laxatives
- Paediatric Motion Sickness Remedies
- Diarrhoeal Remedies
- IBS Treatments
- Indigestion and Heartburn Remedies
- Antacids
- Antiflatulents
- Digestive Enzymes
- H2 Blockers
- Proton Pump Inhibitors
- Laxatives
- Motion Sickness Remedies
- Digestive Remedies

	2021/2022	2021-26 CAGR	2021/26 Total
Data removed from sample			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

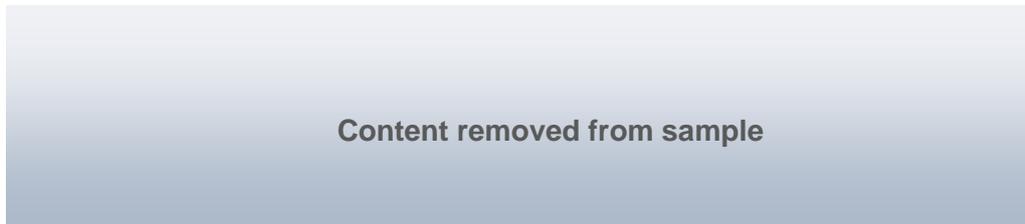
EYE CARE IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

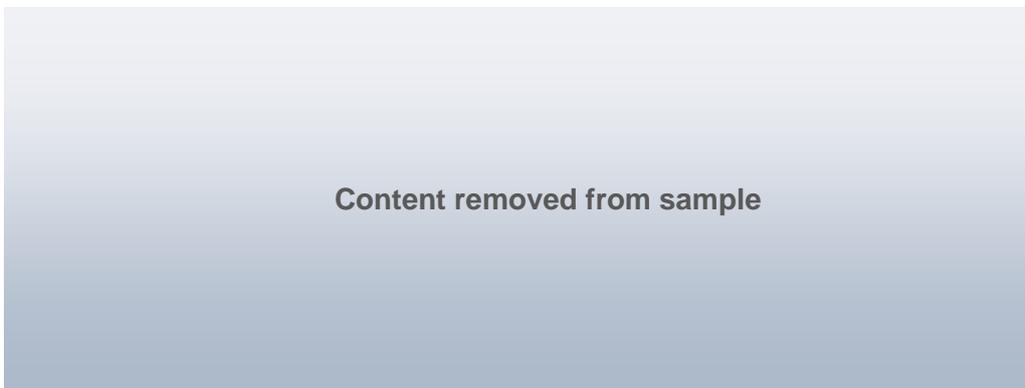


2021 DEVELOPMENTS

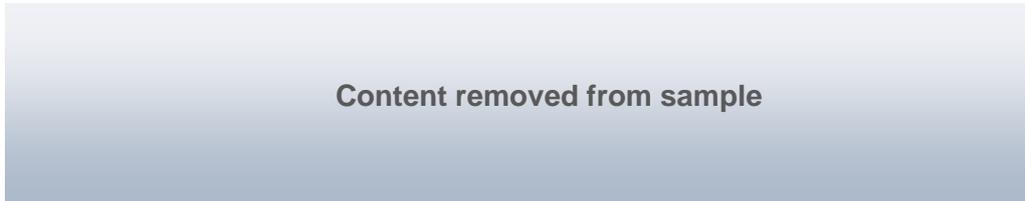
Allergy eye care registers higher growth than standard eye care



Sothema retains its leadership

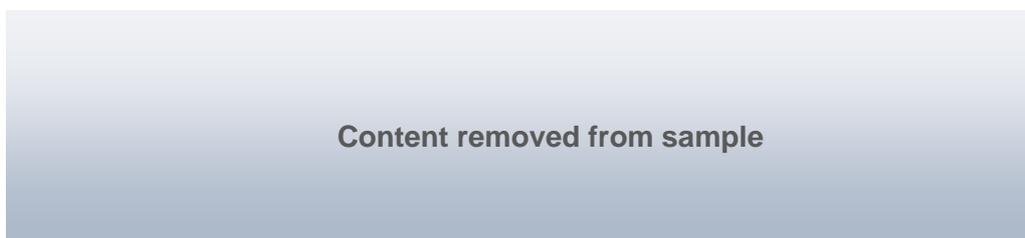


Drops remains the dominant format in eye care

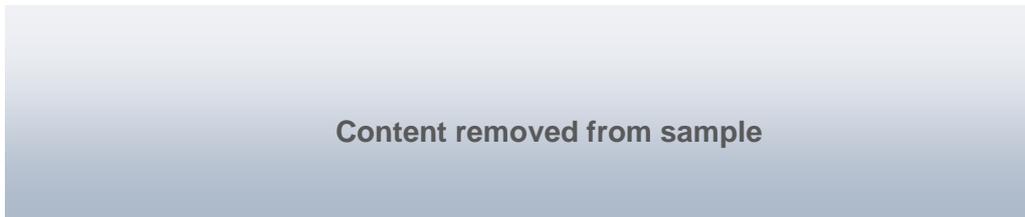


PROSPECTS AND OPPORTUNITIES

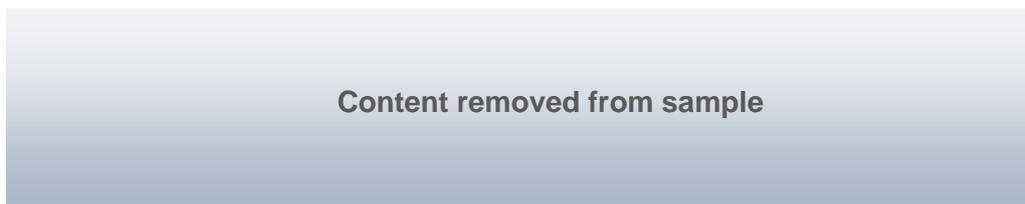
Positive outlook over forecast period



Natural positioning and further innovation needed



Medical caravans in Morocco increase brand awareness in eye care



CATEGORY DATA

Table 42 Sales of Eye Care by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
-------------	------	------	------	------	------	------

- Allergy Eye Care
 - Standard Eye Care
 Eye Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 43 Sales of Eye Care by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Allergy Eye Care
 - Standard Eye Care
 Eye Care

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 44 NBO Company Shares of Eye Care: % Value 2017-2021

% retail value rsp
 Company

2017 2018 2019 2020 2021

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 45 LBN Brand Shares of Eye Care: % Value 2018-2021

% retail value rsp
 Brand (GBO)

Company (NBO) 2018 2019 2020 2021

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 46 Forecast Sales of Eye Care by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
- Allergy Eye Care - Standard Eye Care Eye Care	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 47 Forecast Sales of Eye Care by Category: % Value Growth 2021-2026

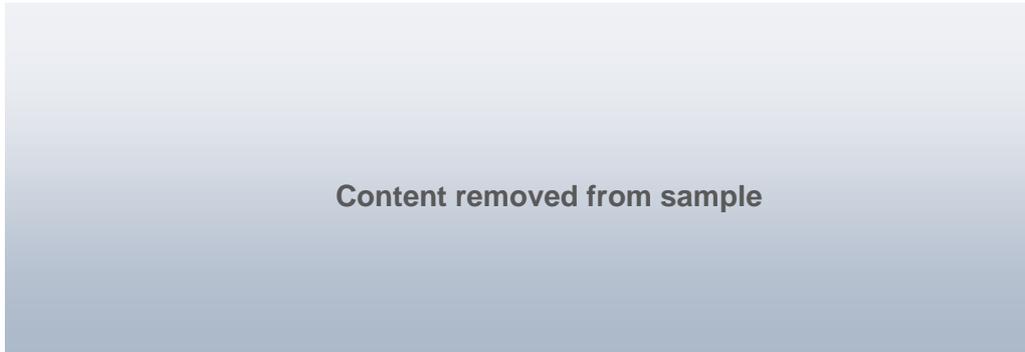
% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Allergy Eye Care - Standard Eye Care Eye Care	Data removed from sample		

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

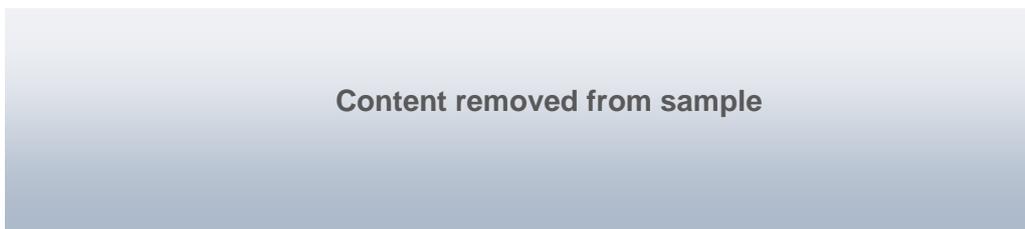
NRT SMOKING CESSATION AIDS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

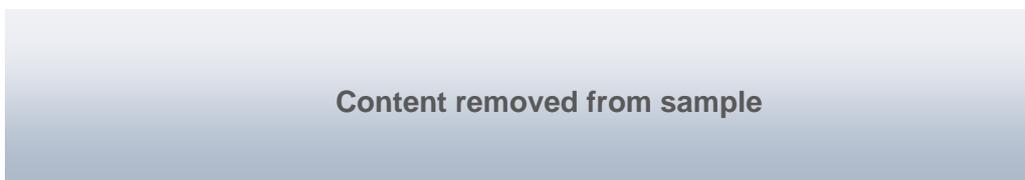


2021 DEVELOPMENTS

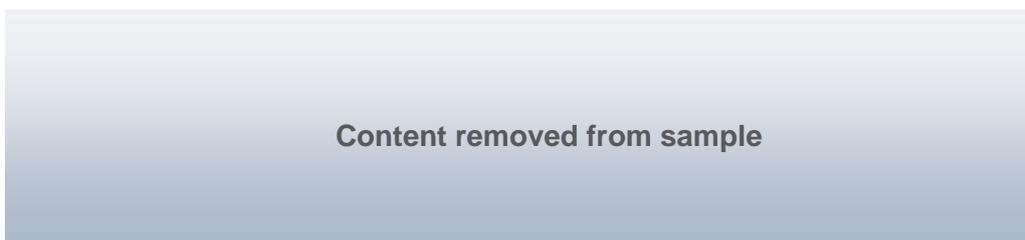
Moroccans prioritise essential consumer health during pandemic



Pierre Fabre SA Laboratoires to retain monopoly status



Monopoly structure leads to high prices



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PROSPECTS AND OPPORTUNITIES

Muted growth over forecast period

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More competition needed to stimulate growth

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Concerns about vaping could lead e-smokers to NRT smoking cessation aids

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CATEGORY INDICATORS

Table 48 Number of Smokers by Gender 2016-2021

	2016	2017	2018	2019	2020	2021
Male ('000)	Data removed from sample					
Male (%)						
Female ('000)						
Female (%)						
Total ('000)						
Total (%)						

Source: Euromonitor International from official statistics

CATEGORY DATA

Table 49 Sales of NRT Smoking Cessation Aids by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
- NRT Gum	Data removed from sample					
- NRT Inhalators						
- NRT Lozenges						
- NRT Patches						
- Other NRT						
NRT Smoking Cessation Aids						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 50 Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- NRT Gum	Data removed from sample		
- NRT Inhalators			
- NRT Lozenges			
- NRT Patches			
- Other NRT			
NRT Smoking Cessation Aids			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 51 NBO Company Shares of NRT Smoking Cessation Aids: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 52 LBN Brand Shares of NRT Smoking Cessation Aids: % Value 2018-2021

% retail value rsp

Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-------------	---------------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Forecast Sales of NRT Smoking Cessation Aids by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

- NRT Gum
- NRT Inhalators
- NRT Lozenges
- NRT Patches
- Other NRT
- NRT Smoking Cessation Aids

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 54 Forecast Sales of NRT Smoking Cessation Aids by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
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- NRT Gum
- NRT Inhalators
- NRT Lozenges
- NRT Patches
- Other NRT
- NRT Smoking Cessation Aids

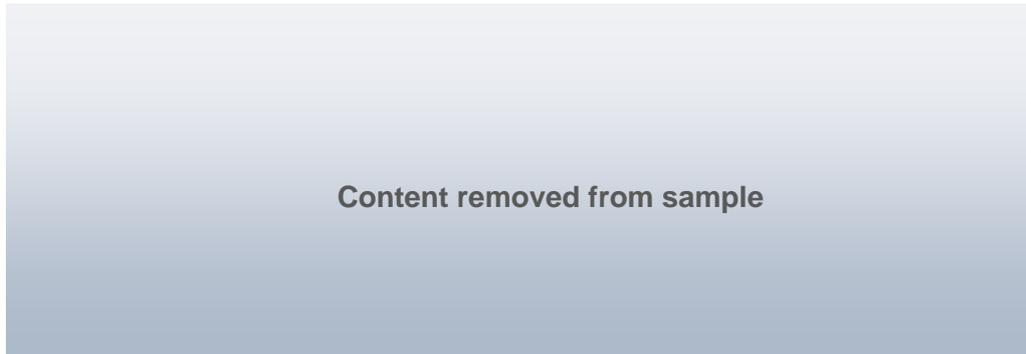
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

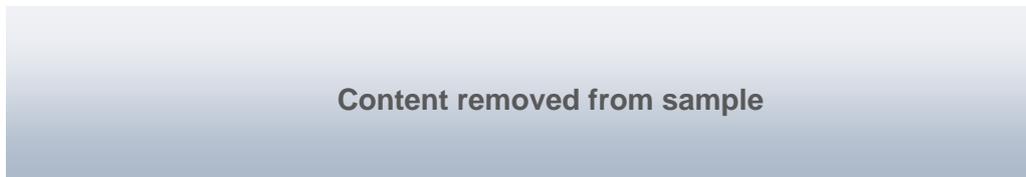
WOUND CARE IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS



2021 DEVELOPMENTS

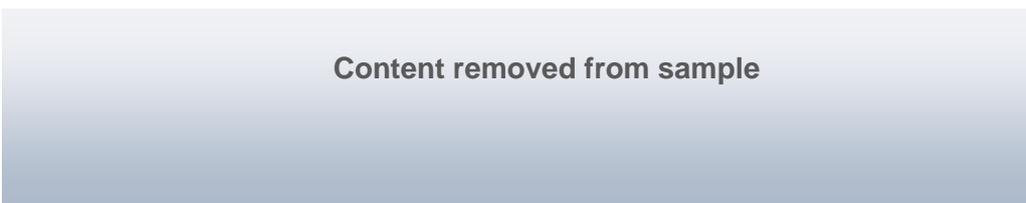
Recovery after 2020 decline



Leading players retain their positions with well-known brands



Imported brands enter, chipping away at brand leaders' value shares



PROSPECTS AND OPPORTUNITIES

Recovery picks up as society reopens

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Practicality and affordability are key factors in consumer decision making in wound care

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Innovation needed to stand out from competition

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CATEGORY DATA

Table 55 Sales of Wound Care by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
- First Aid Kits	Data removed from sample					
- Gauze, Tape and Other Wound Care						
- Sticking Plasters/ Adhesive Bandages						
Wound Care						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 56 Sales of Wound Care by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
- First Aid Kits	Data removed from sample		
- Gauze, Tape and Other Wound Care			
- Sticking Plasters/Adhesive Bandages			
Wound Care			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 57 NBO Company Shares of Wound Care: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
-------------------------------	------	------	------	------	------

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 58 LBN Brand Shares of Wound Care: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 59 Forecast Sales of Wound Care by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
- First Aid Kits	Data removed from sample					
- Gauze, Tape and Other Wound Care						
- Sticking Plasters/ Adhesive Bandages Wound Care						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

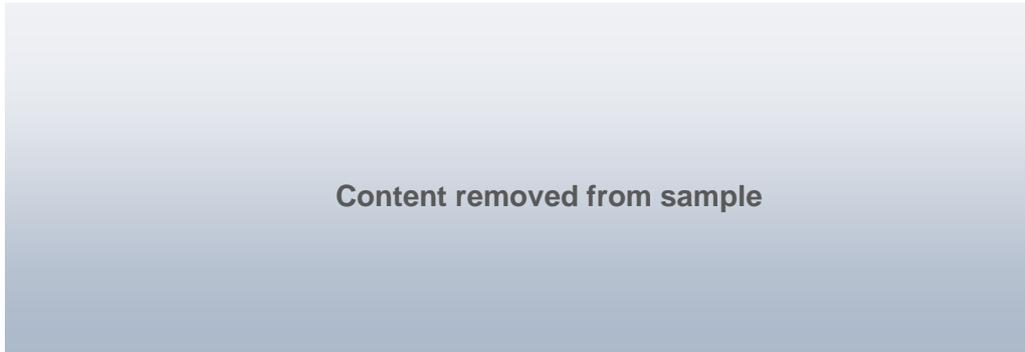
Table 60 Forecast Sales of Wound Care by Category: % Value Growth 2021-2026

% constant value growth	2021/2022	2021-26 CAGR	2021/26 Total
- First Aid Kits	Data removed from sample		
- Gauze, Tape and Other Wound Care			
- Sticking Plasters/Adhesive Bandages Wound Care			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

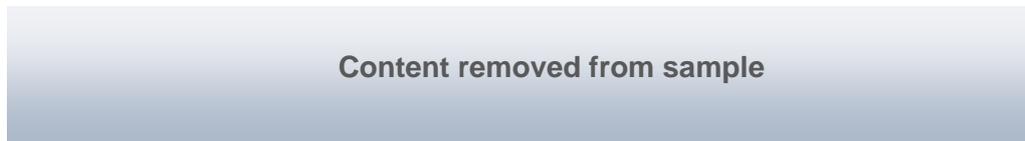
SPORTS NUTRITION IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

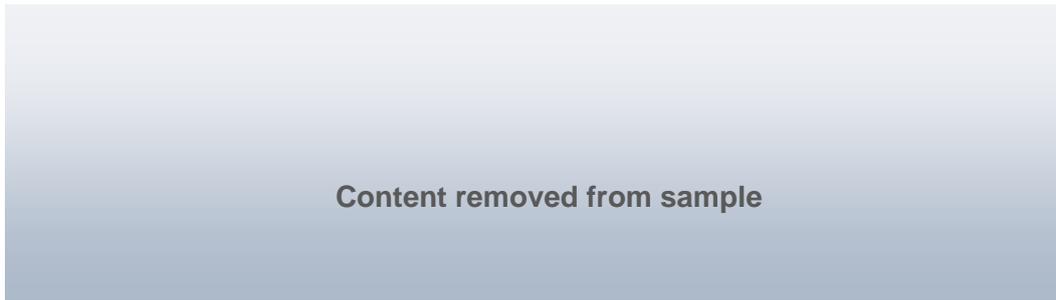


2021 DEVELOPMENTS

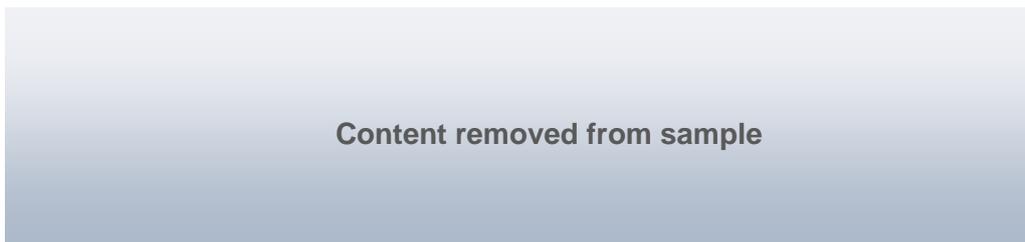
Higher value growth as people take up physical activity again



Weider Global Nutrition retains leadership thanks to brand recognition and wide availability

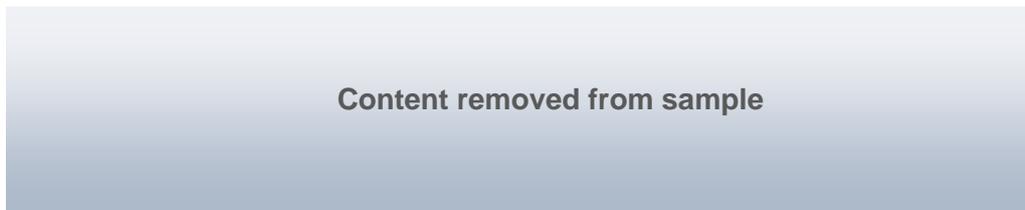


E-commerce important channel for sports nutrition

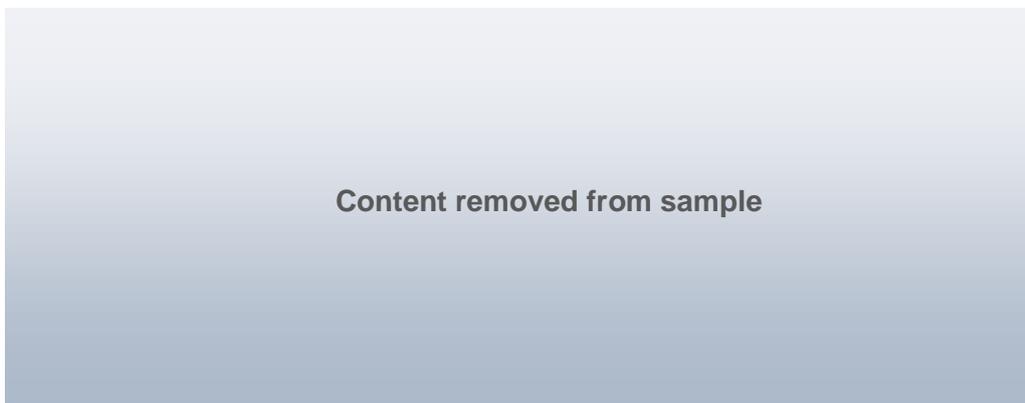


PROSPECTS AND OPPORTUNITIES

Good outlook over forecast period



Sports nutrition continues to grow in Morocco



International brands continue to dominate sports nutrition



CATEGORY DATA

Table 61 Sales of Sports Nutrition by Category: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
Sports Protein Products	Data removed from sample					
- Protein/Energy Bars						
- Sports Protein Powder						
- Sports Protein RTD						

Sports Non-Protein Products
Sports Nutrition

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 62 Sales of Sports Nutrition by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

Sports Protein Products
- Protein/Energy Bars
- Sports Protein Powder
- Sports Protein RTD
Sports Non-Protein Products
Sports Nutrition

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 63 NBO Company Shares of Sports Nutrition: % Value 2017-2021

% retail value rsp

Company 2017 2018 2019 2020 2021

Data removed from sample

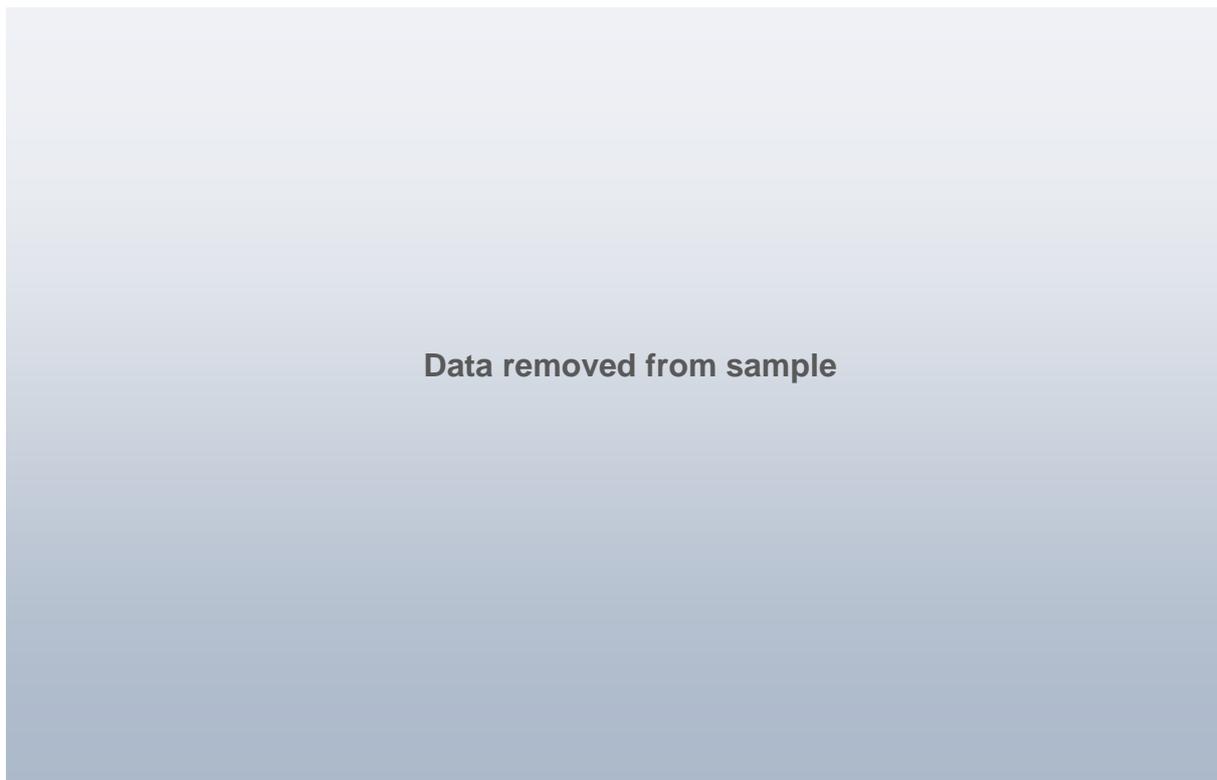
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 64 LBN Brand Shares of Sports Nutrition: % Value 2018-2021

% retail value rsp

Brand (GBO) Company (NBO) 2018 2019 2020 2021

Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 65 Forecast Sales of Sports Nutrition by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
Sports Protein Products	Data removed from sample					
- Protein/Energy Bars						
- Sports Protein Powder						
- Sports Protein RTD						
Sports Non-Protein Products	Data removed from sample					
Sports Nutrition						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 66 Forecast Sales of Sports Nutrition by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
Sports Protein Products	Data removed from sample		
- Protein/Energy Bars			

- Sports Protein Powder
- Sports Protein RTD
Sports Non-Protein Products
Sports Nutrition

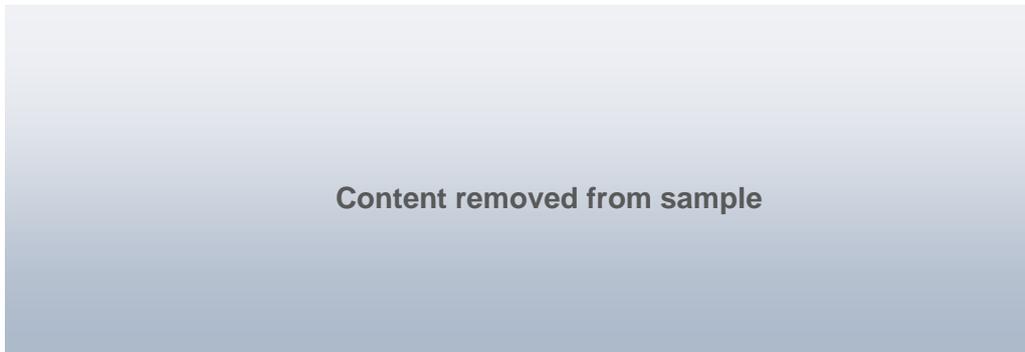
Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

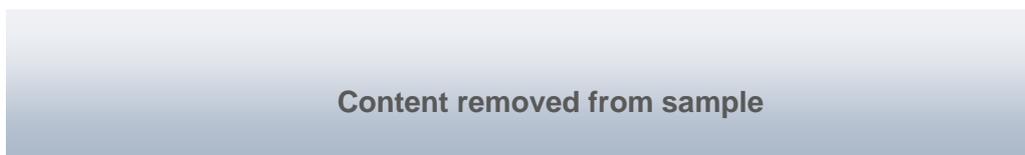
DIETARY SUPPLEMENTS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

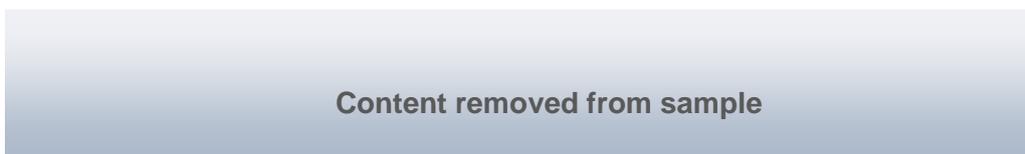


2021 DEVELOPMENTS

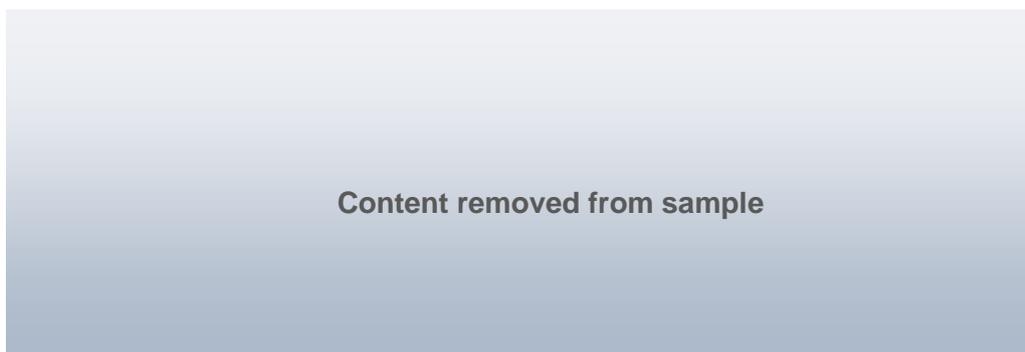
Lower but healthy value growth in 2021



Despite decreased value share, GSK will continue to lead dietary supplements as Laprophan settles for second place

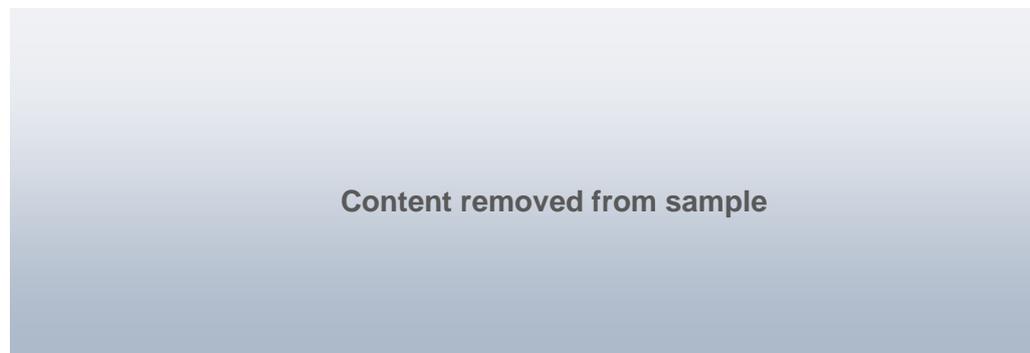


Imported brands and e-commerce put pressure on leaders



PROSPECTS AND OPPORTUNITIES

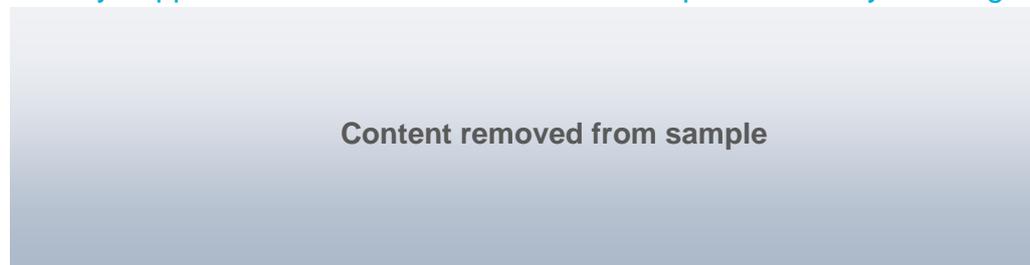
Moderate outlook over forecast period



Split expected to remain stable as consumers stick to necessary products



Dietary supplements taken in combination with positive lifestyle changes



CATEGORY DATA

Table 67 Sales of Dietary Supplements by Category: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
- Combination Dietary Supplements	Data removed from sample					
- Herbal/Traditional Dietary Supplements						
-- Combination Herbal/Traditional Dietary Supplements						
-- Echinacea						
-- Evening Primrose Oil						

- Garlic
- Ginkgo Biloba
- Ginseng
- St John's Wort
- Other Herbal/
Traditional Dietary
Supplements
- Aloe
- Cranberry
- Non-Herbal/
Traditional Dietary
Supplements
- Co-Enzyme Q10
- Combination Non-
Herbal/Traditional
Dietary Supplements
- Eye Health Supplements
- Fish Oils/Omega
Fatty Acids
- Glucosamine
- Minerals
- Calcium Supplements
- Mineral Supplements
- Probiotic Supplements
- Protein Supplements
- Other Non-Herbal/
Traditional Dietary
Supplements
- Dietary Supplements



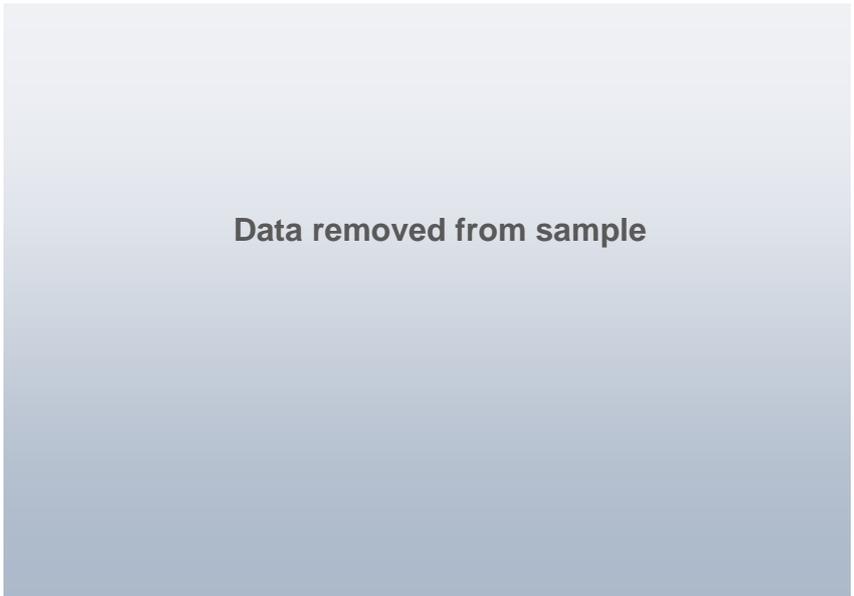
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 68 Sales of Dietary Supplements by Category: % Value Growth 2016-2021

% current value growth

2020/21 2016-21 CAGR 2016/21 Total

- Combination Dietary Supplements
- Herbal/Traditional Dietary Supplements
- Combination Herbal/Traditional
Dietary Supplements
- Echinacea
- Evening Primrose Oil
- Garlic
- Ginkgo Biloba
- Ginseng
- St John's Wort
- Other Herbal/Traditional Dietary
Supplements
- Aloe
- Cranberry
- Non-Herbal/Traditional Dietary
Supplements
- Co-Enzyme Q10
- Combination Non-Herbal/Traditional
Dietary Supplements
- Eye Health Supplements
- Fish Oils/Omega Fatty Acids



- Glucosamine
- Minerals
- Calcium Supplements
- Mineral Supplements
- Probiotic Supplements
- Protein Supplements
- Other Non-Herbal/Traditional Dietary Supplements

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 69 Sales of Dietary Supplements by Positioning: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Beauty	Data removed from sample					
Bone						
Energy						
General Health						
Heart Health						
Memory Health						
Sexual Health						
Women's Health						
Other Dietary Supplement Positioning						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 70 NBO Company Shares of Dietary Supplements: % Value 2017-2021

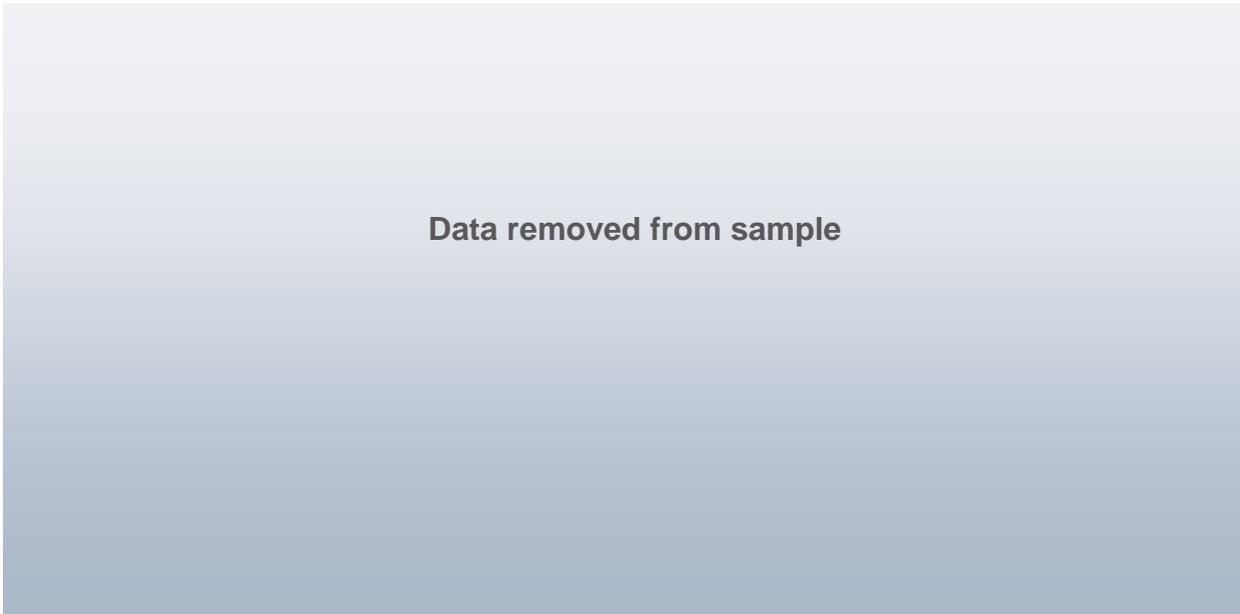
% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

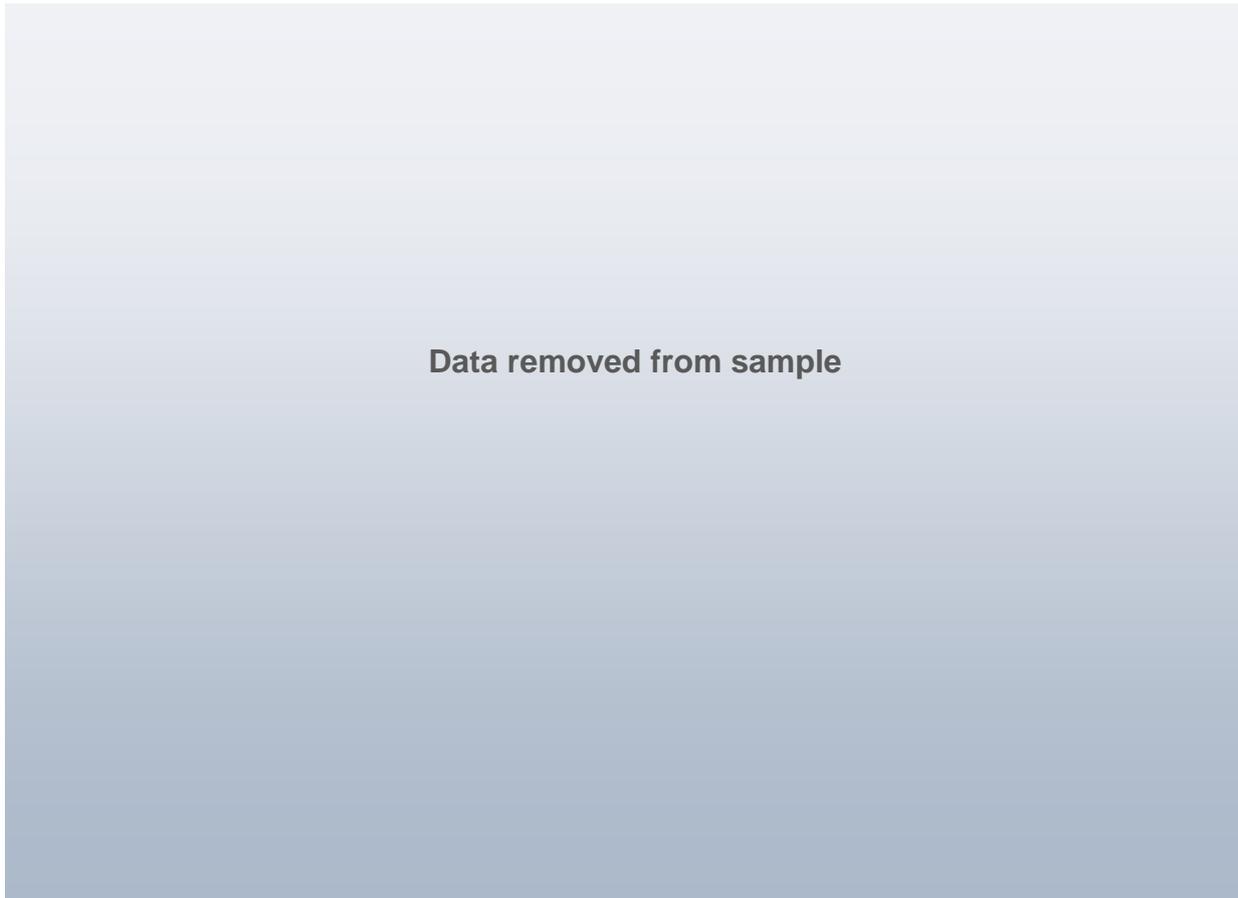


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 71 LBN Brand Shares of Dietary Supplements: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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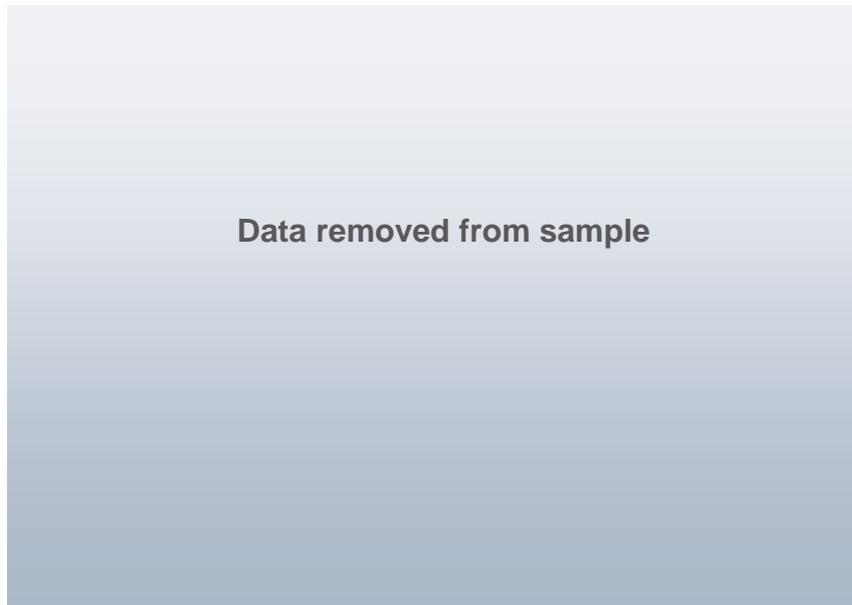
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 72 Forecast Sales of Dietary Supplements by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
- Combination Dietary Supplements	Data removed from sample					
- Herbal/Traditional Dietary Supplements						
-- Combination Herbal/Traditional Dietary Supplements						
-- Echinacea						
-- Evening Primrose Oil						
-- Garlic						
-- Ginkgo Biloba						
-- Ginseng						
-- St John's Wort						
-- Other Herbal/Traditional Dietary						

- Supplements
- Aloe
- Cranberry
- Non-Herbal/Traditional Dietary Supplements
- Co-Enzyme Q10
- Combination Non-Herbal/Traditional Dietary Supplements
- Eye Health Supplements
- Fish Oils/Omega Fatty Acids
- Glucosamine
- Minerals
- Calcium Supplements
- Mineral Supplements
- Probiotic Supplements
- Protein Supplements
- Other Non-Herbal/Traditional Dietary Supplements
- Dietary Supplements

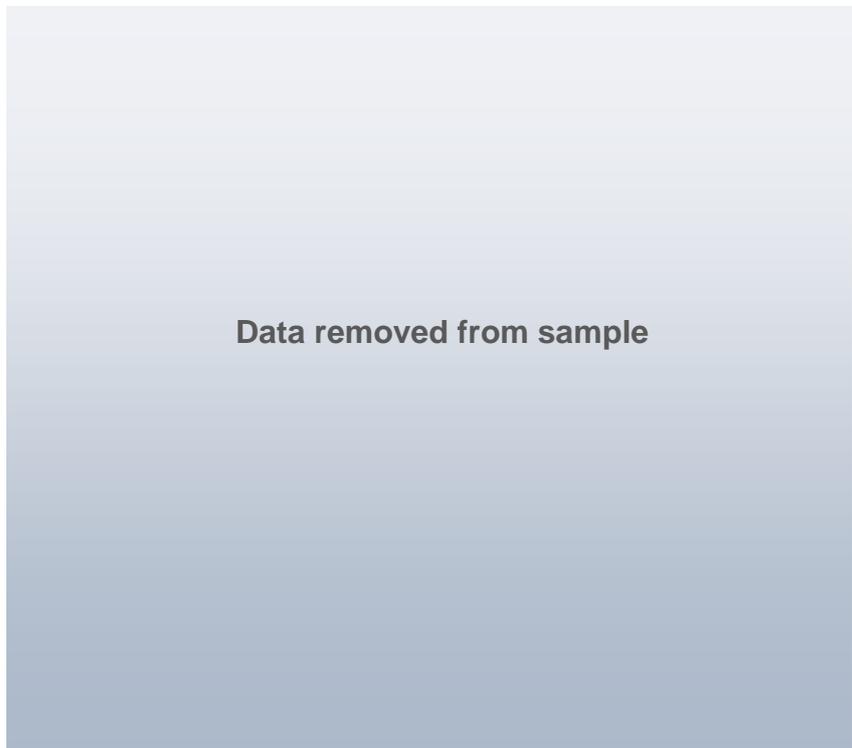


Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

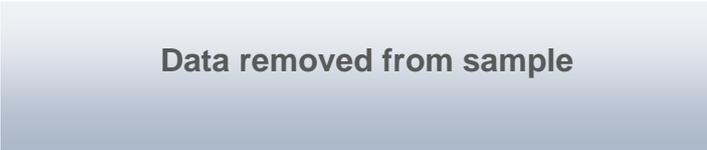
Table 73 Forecast Sales of Dietary Supplements by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
- Combination Dietary Supplements			
- Herbal/Traditional Dietary Supplements			
-- Combination Herbal/Traditional Dietary Supplements			
-- Echinacea			
-- Evening Primrose Oil			
-- Garlic			
-- Ginkgo Biloba			
-- Ginseng			
-- St John's Wort			
-- Other Herbal/Traditional Dietary Supplements			
-- Aloe			
-- Cranberry			
- Non-Herbal/Traditional Dietary Supplements			
-- Co-Enzyme Q10			
-- Combination Non-Herbal/Traditional Dietary Supplements			
-- Eye Health Supplements			
-- Fish Oils/Omega Fatty Acids			
-- Glucosamine			
-- Minerals			
--- Calcium Supplements			
--- Mineral Supplements			
-- Probiotic Supplements			



- Protein Supplements
- Other Non-Herbal/Traditional
Dietary Supplements
- Dietary Supplements



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

VITAMINS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

Content removed from sample

2021 DEVELOPMENTS

Lower value growth than 2020, but still healthy

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Bayer to retain its lead in 2021 despite increasing pressure from smaller players

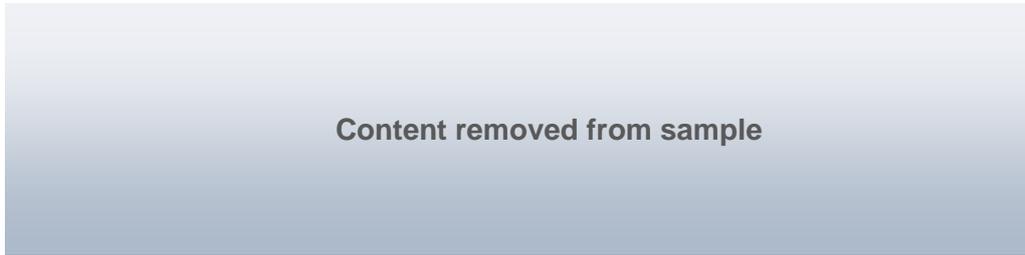
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Paediatric vitamins remains niche with considerable room for growth

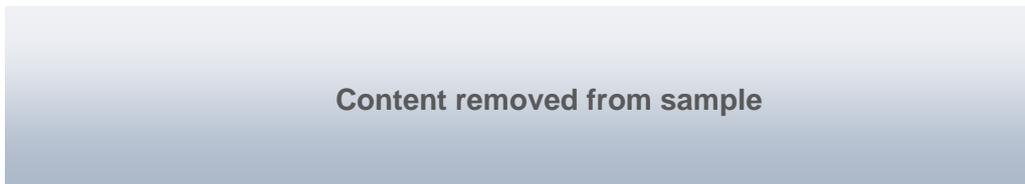
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PROSPECTS AND OPPORTUNITIES

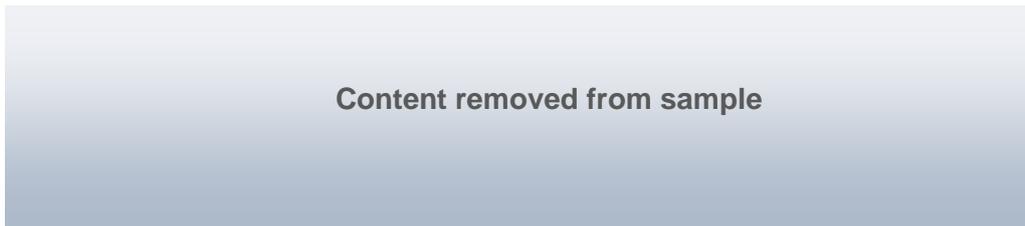
Healthy value growth over forecast period



Doctors are not normally consulted before Moroccans purchase vitamins



E-commerce increases consumer awareness and boosts sales of vitamins



CATEGORY DATA

Table 74 Sales of Vitamins by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
- Multivitamins	Data removed from sample					
- Single Vitamins						
-- Vitamin A						
-- Vitamin B						
-- Vitamin C						
-- Vitamin D						
-- Vitamin E						
-- Other Single Vitamins						
Vitamins						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 75 Sales of Vitamins by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
- Multivitamins	Data removed from sample		
- Single Vitamins			
-- Vitamin A			
-- Vitamin B			
-- Vitamin C			
-- Vitamin D			
-- Vitamin E			
-- Other Single Vitamins			
Vitamins			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 76 Sales of Multivitamins by Positioning: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Elderly	Data removed from sample					
Men						
Pregnancy						
Teenagers						
Women						
Other Multivitamins						
Positioning						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 77 NBO Company Shares of Vitamins: % Value 2017-2021

% retail value rsp	2017	2018	2019	2020	2021
Company	Data removed from sample				

Data removed from sample					
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 78 LBN Brand Shares of Vitamins: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 79 Forecast Sales of Vitamins by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
- Multivitamins	Data removed from sample					
- Single Vitamins						
-- Vitamin A						
-- Vitamin B						
-- Vitamin C						
-- Vitamin D						
-- Vitamin E						
-- Other Single Vitamins						
Vitamins						

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 80 Forecast Sales of Vitamins by Category: % Value Growth 2021-2026

% constant value growth

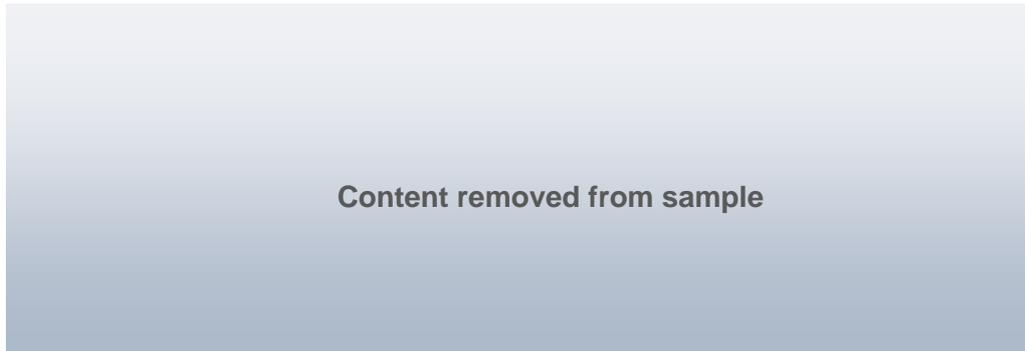
	2021/2022	2021-26 CAGR	2021/26 Total
- Multivitamins	Data removed from sample		
- Single Vitamins			
-- Vitamin A			
-- Vitamin B			
-- Vitamin C			
-- Vitamin D			
-- Vitamin E			
-- Other Single Vitamins			
Vitamins			

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

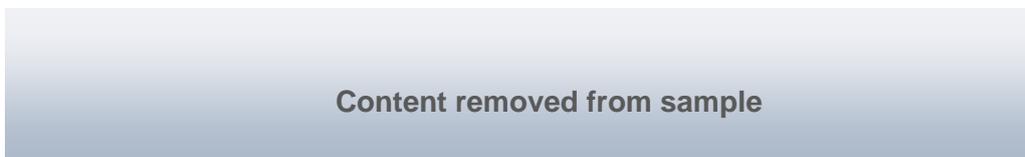
WEIGHT MANAGEMENT AND WELLBEING IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

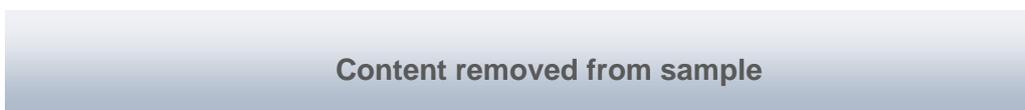


2021 DEVELOPMENTS

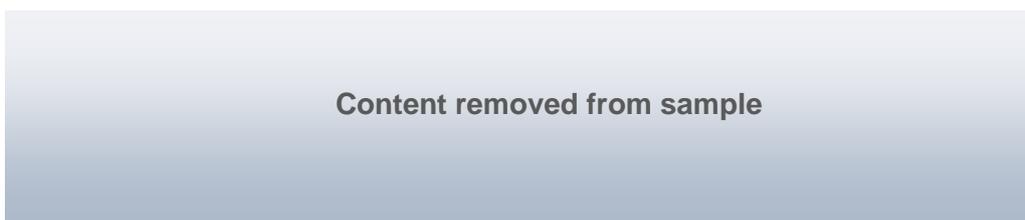
Lower growth than 2020, but still healthy



Forté Pharma maintains lead despite growing competition from smaller players



Players with online presence perform well



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PROSPECTS AND OPPORTUNITIES

Consumers look to shed weight, post COVID-19

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Penetration remains low as home remedies still popular amongst Moroccans

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Fears over diabetes to stimulate growth in the coming years

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CATEGORY DATA

Table 81 Sales of Weight Management and Wellbeing by Category: Value 2016-2021

MAD million	2016	2017	2018	2019	2020	2021
Meal Replacement	Data removed from sample					
OTC Obesity						
Slimming Teas						
Supplement Nutrition						
Drinks						
Weight Loss Supplements						
Weight Management and						

Wellbeing

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 82 Sales of Weight Management and Wellbeing by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Meal Replacement	Data removed from sample		
OTC Obesity			
Slimming Teas			
Supplement Nutrition Drinks			
Weight Loss Supplements			
Weight Management and Wellbeing			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 83 NBO Company Shares of Weight Management and Wellbeing: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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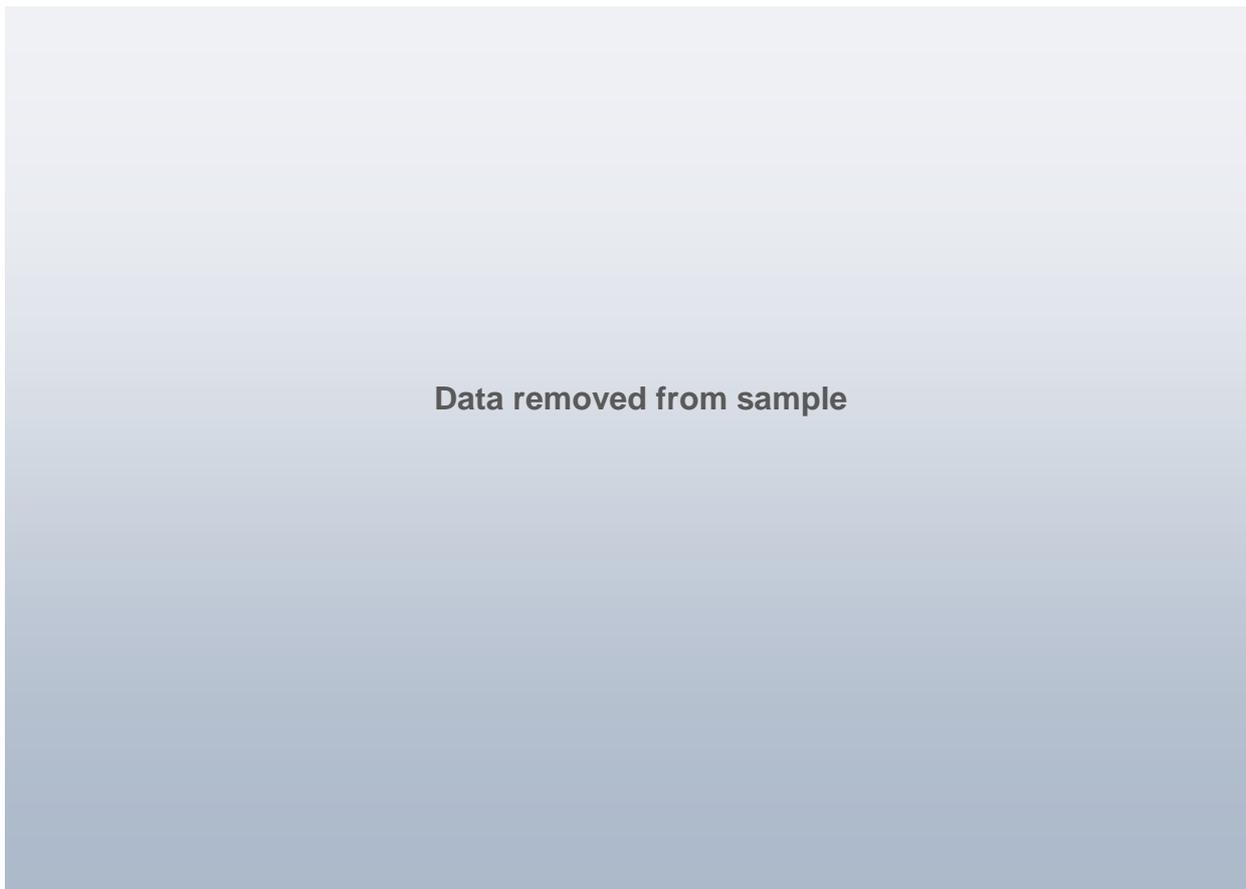
Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 84 LBN Brand Shares of Weight Management and Wellbeing: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 85 Forecast Sales of Weight Management and Wellbeing by Category: Value 2021-2026

MAD million

	2021	2022	2023	2024	2025	2026
Meal Replacement	Data removed from sample					
OTC Obesity						
Slimming Teas						
Supplement Nutrition						
Drinks						
Weight Loss Supplements						
Weight Management and Wellbeing	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 86 Forecast Sales of Weight Management and Wellbeing by Category: % Value Growth 2021-2026

% constant value growth

	2021/2022	2021-26 CAGR	2021/26 Total
	Data removed from sample		

Meal Replacement
OTC Obesity
Slimming Teas
Supplement Nutrition Drinks
Weight Loss Supplements
Weight Management and Wellbeing

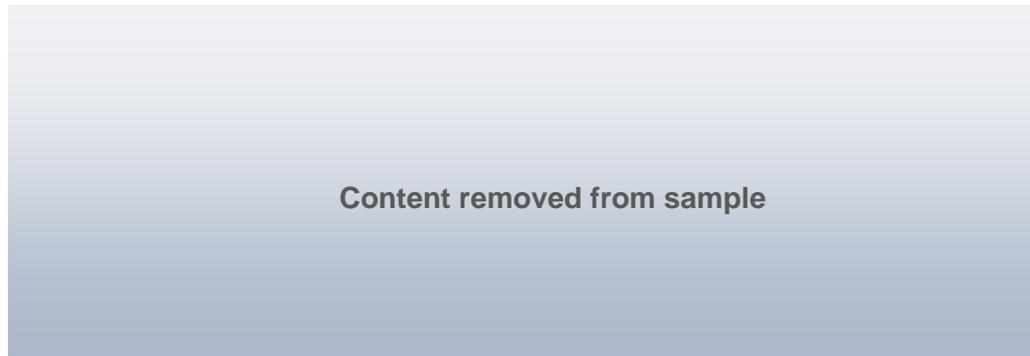
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

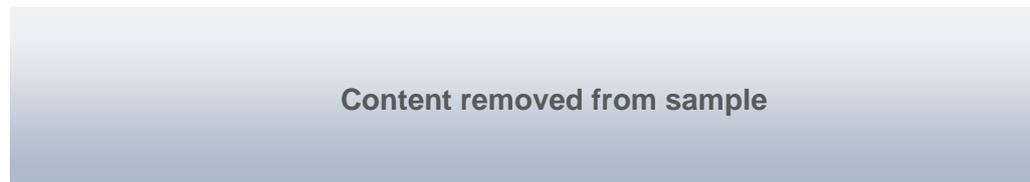
HERBAL/TRADITIONAL PRODUCTS IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

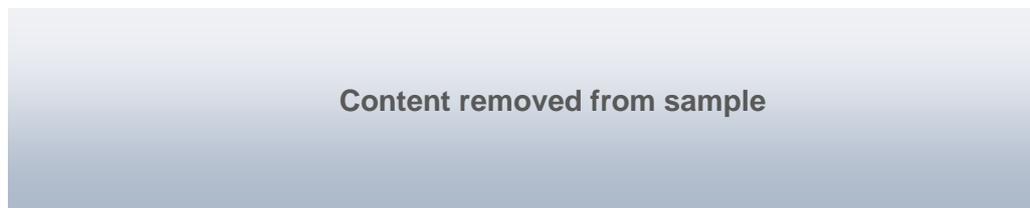


2021 DEVELOPMENTS

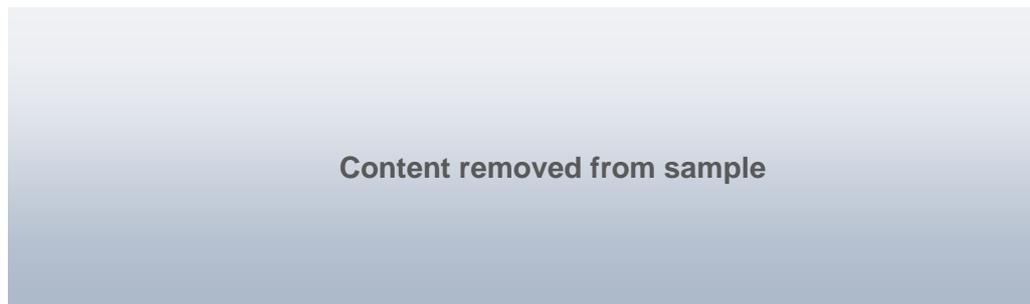
Continued healthy value growth in 2021



Mondelez Maroc to retain leadership thanks to widely recognised successful brands

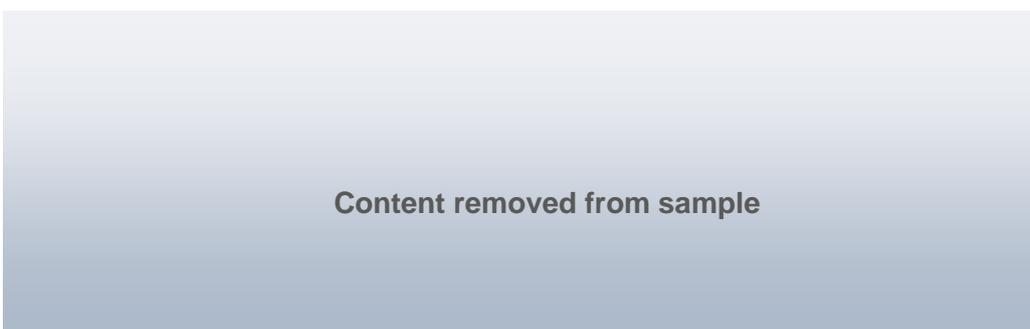
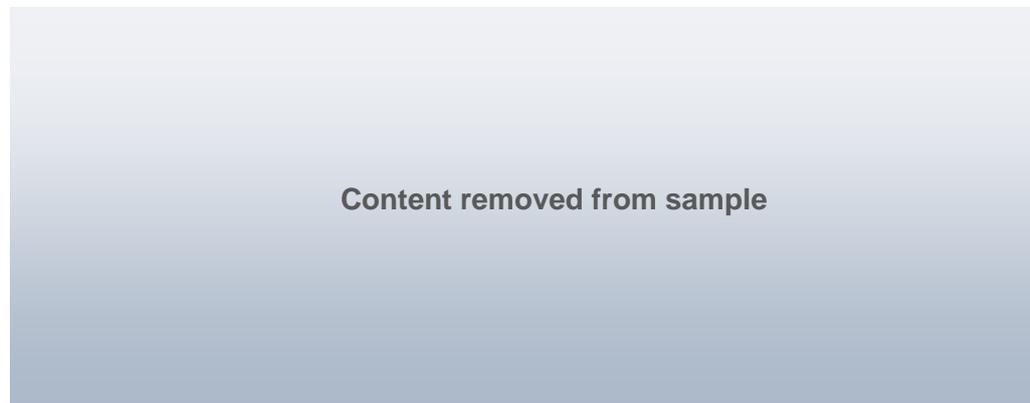


Varied distribution supports growth, with e-commerce gaining value share

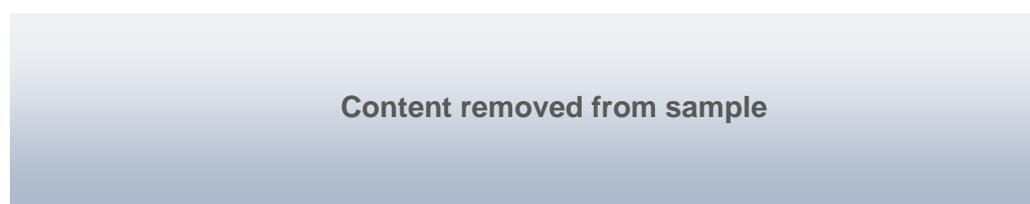


PROSPECTS AND OPPORTUNITIES

Growing interest in herbal/traditional products as consumers seek to avoid side effects



Lack of regulation makes growth easier



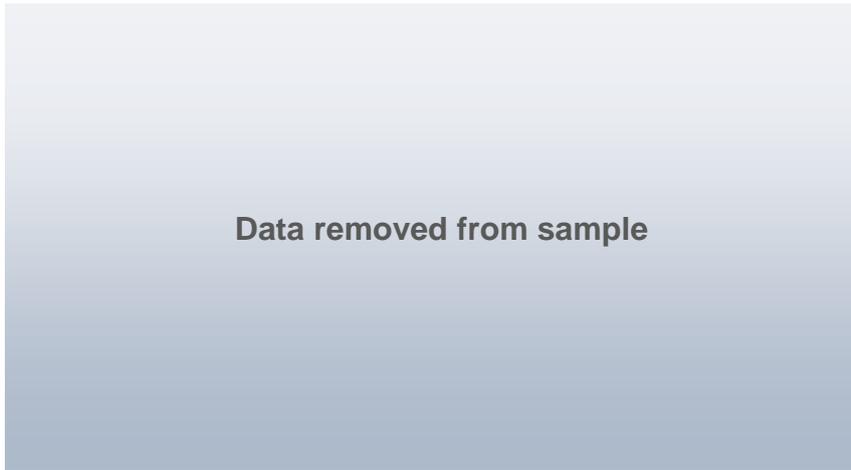
CATEGORY DATA

Table 87 Sales of Herbal/Traditional Products by Category: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
Herbal/Traditional	Data removed from sample					
Topical Analgesics						
Herbal/Traditional						

Sleep Aids
Herbal/Traditional
Cough, Cold and Allergy
(Hay Fever) Remedies
Herbal/Traditional
Digestive Remedies
Herbal/Traditional
Dermatologicals
Herbal/Traditional
Paediatric Dietary
Supplements
Herbal/Traditional
Dietary Supplements
Herbal/Traditional Tonics
Herbal/Traditional
Products



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: 2021 data is provisional and based on part-year estimates

Table 88 Sales of Herbal/Traditional Products by Category: % Value Growth 2016-2021

% current value growth

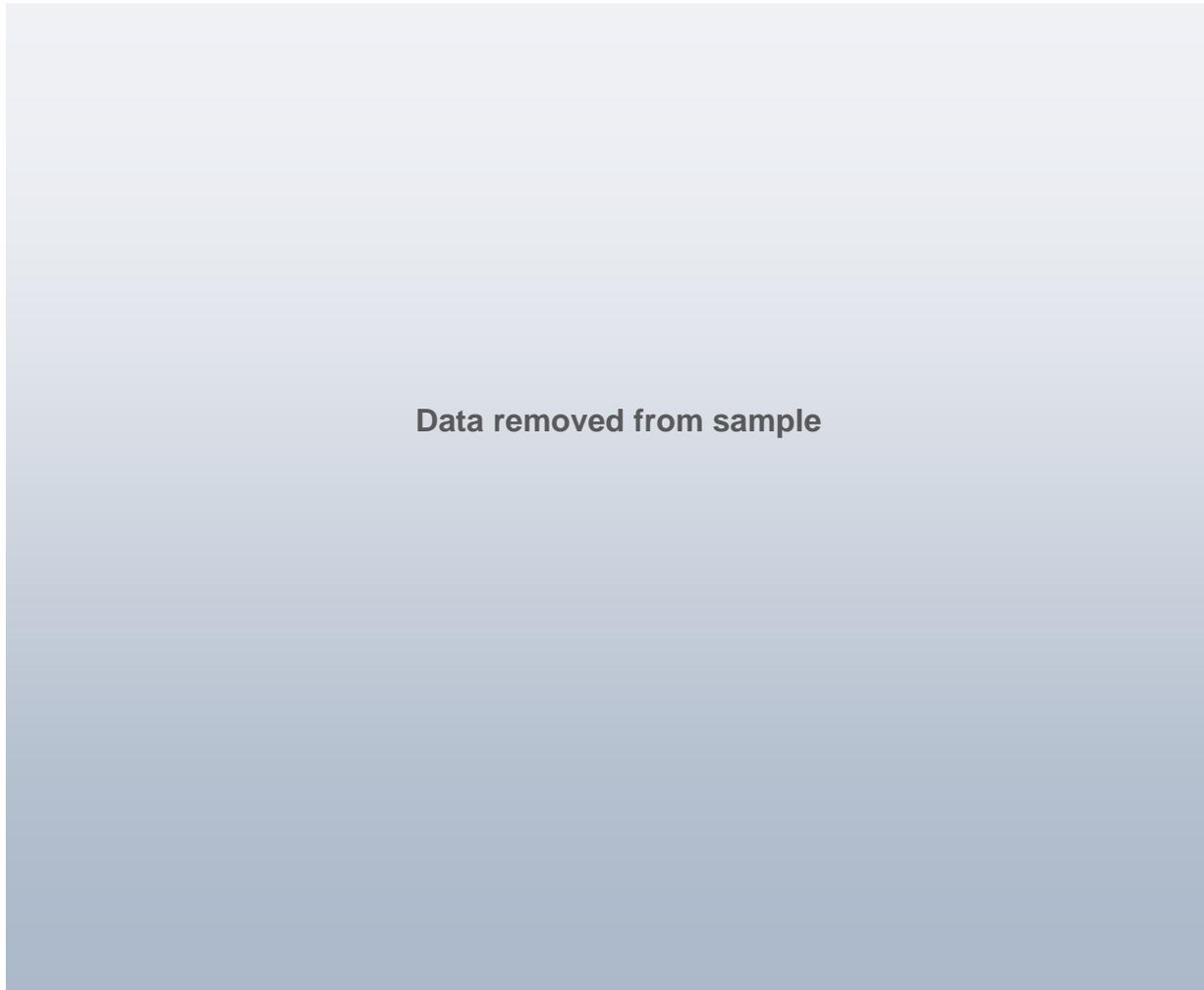
	2020/21	2016-21 CAGR	2016/21 Total
Herbal/Traditional Topical Analgesics	Data removed from sample		
Herbal/Traditional Sleep Aids			
Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies			
Herbal/Traditional Digestive Remedies			
Herbal/Traditional Dermatologicals			
Herbal/Traditional Paediatric Dietary Supplements			
Herbal/Traditional Dietary Supplements			
Herbal/Traditional Tonics			
Herbal/Traditional Products			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
Note: 2021 data is provisional and based on part-year estimates

Table 89 NBO Company Shares of Herbal/Traditional Products: % Value 2017-2021

% retail value rsp

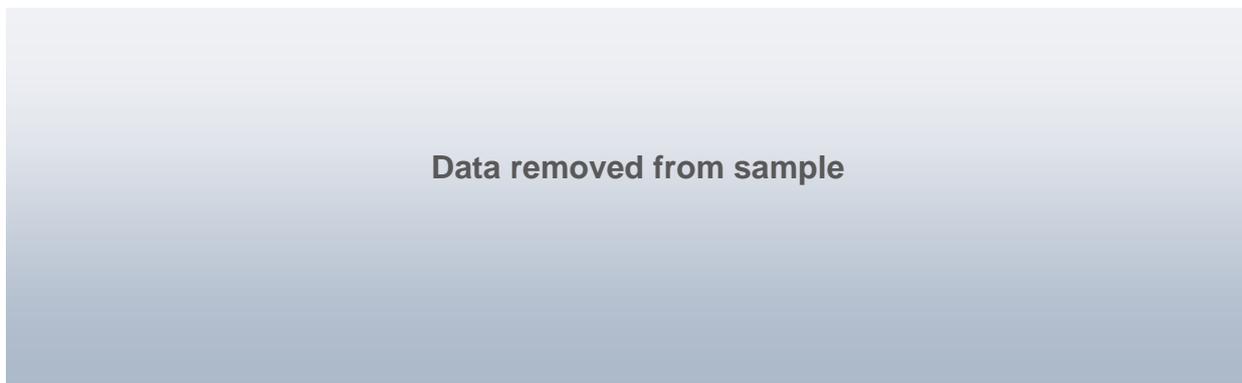
Company	2017	2018	2019	2020	2021
Data removed from sample					



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 90 LBN Brand Shares of Herbal/Traditional Products: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 91 Forecast Sales of Herbal/Traditional Products by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
-------------	------	------	------	------	------	------

- Herbal/Traditional Topical Analgesics
- Herbal/Traditional Sleep Aids
- Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies
- Herbal/Traditional Digestive Remedies
- Herbal/Traditional Dermatologicals
- Herbal/Traditional Paediatric Dietary Supplements
- Herbal/Traditional Dietary Supplements
- Herbal/Traditional Tonics
- Herbal/Traditional Products



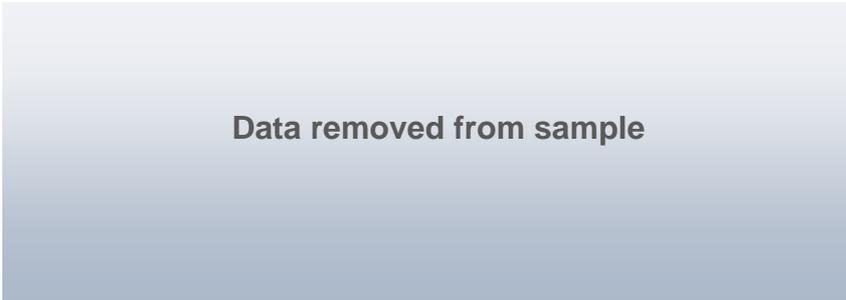
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 92 Forecast Sales of Herbal/Traditional Products by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

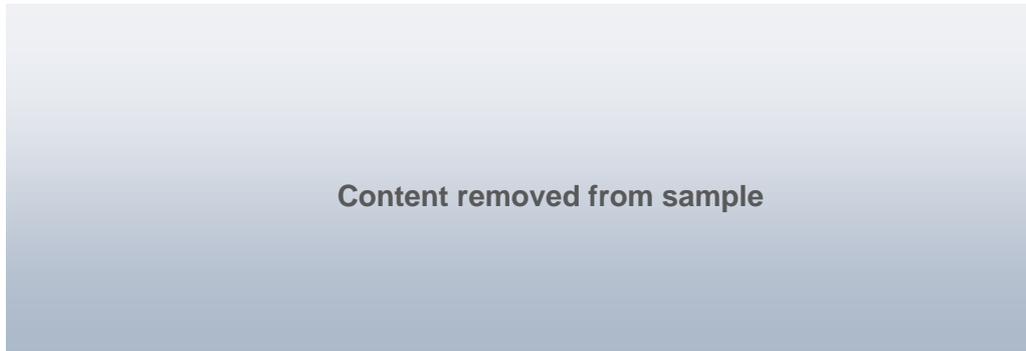
- Herbal/Traditional Topical Analgesics
- Herbal/Traditional Sleep Aids
- Herbal/Traditional Cough, Cold and Allergy (Hay Fever) Remedies
- Herbal/Traditional Digestive Remedies
- Herbal/Traditional Dermatologicals
- Herbal/Traditional Paediatric Dietary Supplements
- Herbal/Traditional Dietary Supplements
- Herbal/Traditional Tonics
- Herbal/Traditional Products



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

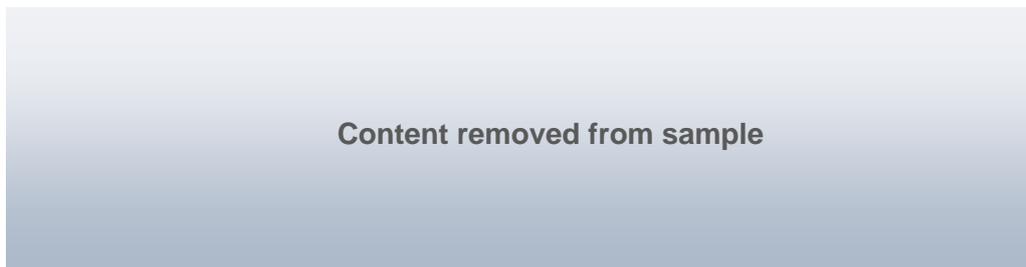
PAEDIATRIC CONSUMER HEALTH IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

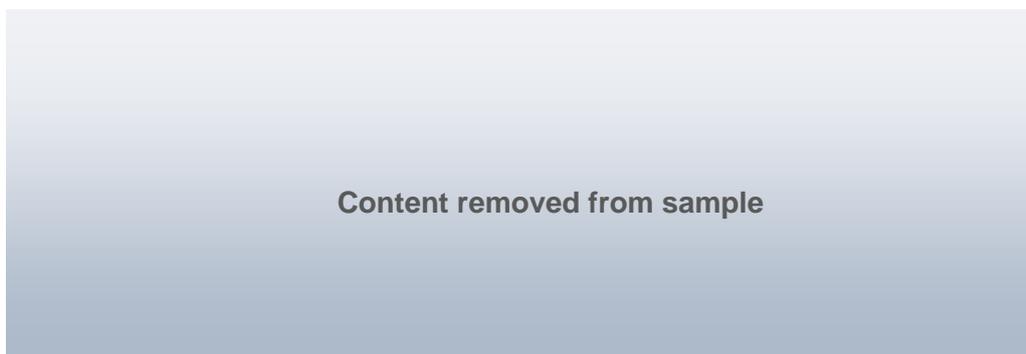


2021 DEVELOPMENTS

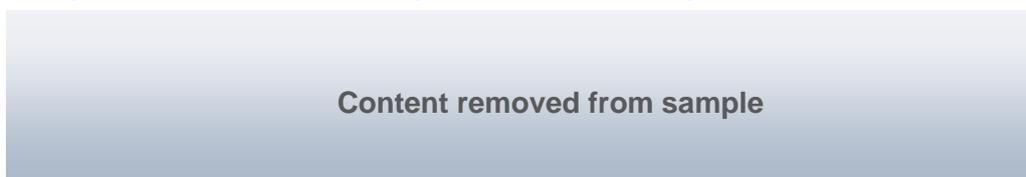
Moderate value growth as excess supplies still being used up



Maphar Laboratoires benefits from wide range and strong brands

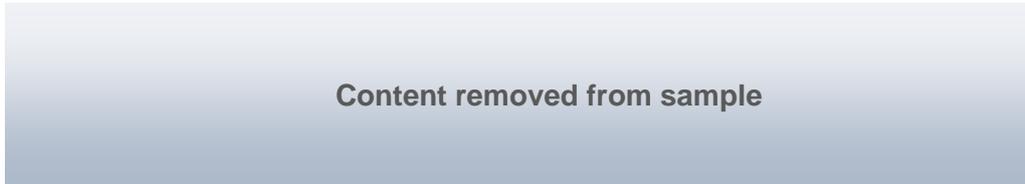


Cough and cold remedies register muted value growth

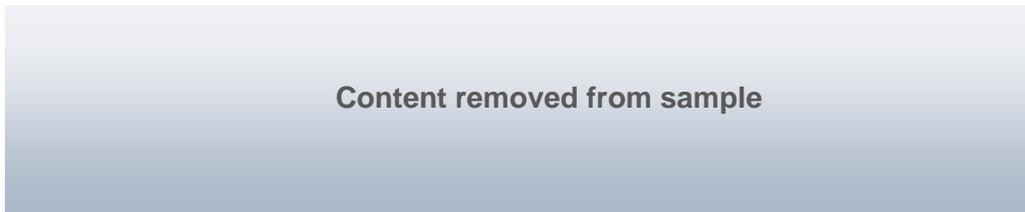


PROSPECTS AND OPPORTUNITIES

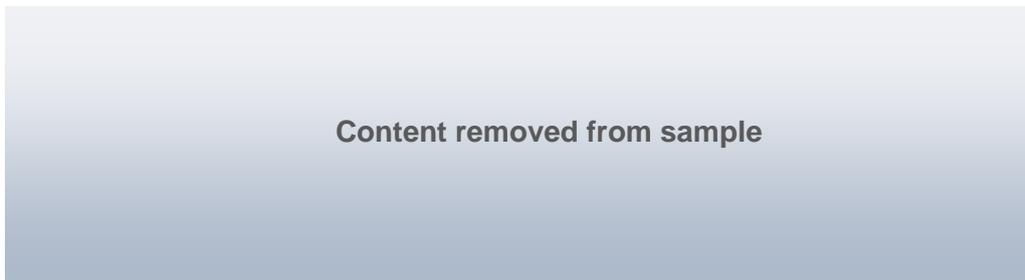
High birth rate maintains value sales



Shift towards natural products over forecast period



Players focus on child-friendly design



CATEGORY DATA

Table 93 Sales of Paediatric Consumer Health by Category: Value 2016-2021

MAD million

	2016	2017	2018	2019	2020	2021
Paediatric Analgesics	Data removed from sample					
- Paediatric Acetaminophen						
- Paediatric Aspirin						
- Paediatric Combination Products - Analgesics						
- Paediatric Dipyron						
- Paediatric Ibuprofen						

- Paediatric Naproxen
- Paediatric Cough, Cold and Allergy Remedies
- Paediatric Allergy Remedies
- Paediatric Cough/Cold Remedies
- Paediatric Digestive Remedies
- Paediatric Diarrhoeal Remedies
- Paediatric Indigestion and Heartburn Remedies
- Paediatric Laxatives
- Paediatric Motion Sickness Remedies
- Paediatric Dermatologicals
- Nappy (Diaper) Rash Treatments
- Paediatric Vitamins and Dietary Supplements
- Paediatric Consumer Health

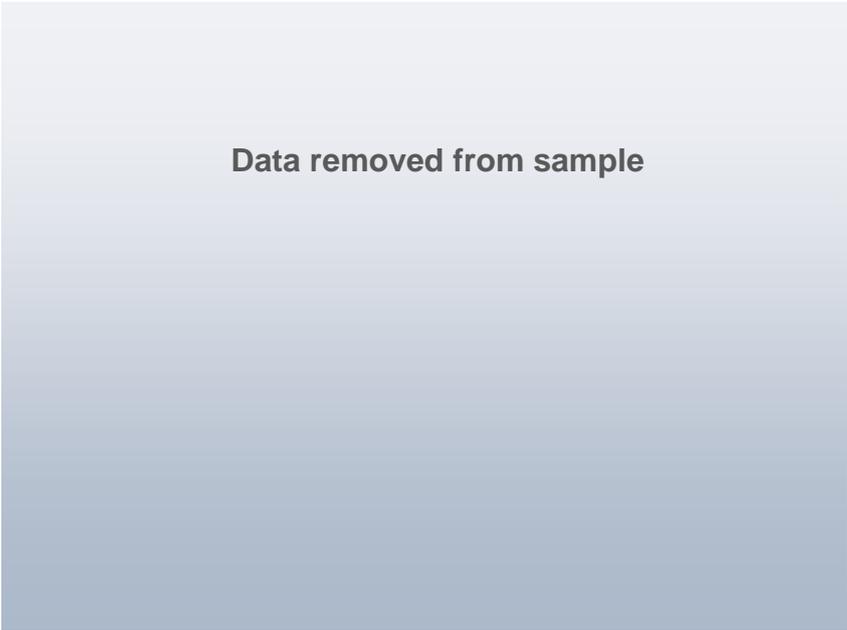


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 94 Sales of Paediatric Consumer Health by Category: % Value Growth 2016-2021

% current value growth

	2020/21	2016-21 CAGR	2016/21 Total
Paediatric Analgesics			
- Paediatric Acetaminophen			
- Paediatric Aspirin			
- Paediatric Combination Products - Analgesics			
- Paediatric Dipyron			
- Paediatric Ibuprofen			
- Paediatric Naproxen			
Paediatric Cough, Cold and Allergy Remedies			
- Paediatric Allergy Remedies			
- Paediatric Cough/Cold Remedies			
Paediatric Digestive Remedies			
- Paediatric Diarrhoeal Remedies			
- Paediatric Indigestion and Heartburn Remedies			
- Paediatric Laxatives			
- Paediatric Motion Sickness Remedies			
Paediatric Dermatologicals			
Nappy (Diaper) Rash Treatments			
Paediatric Vitamins and Dietary Supplements			
Paediatric Consumer Health			



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

Table 95 Sales of Paediatric Vitamins and Dietary Supplements by Type: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Paediatric Dietary Supplements	Data removed from sample					
Paediatric Vitamins						
Total						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

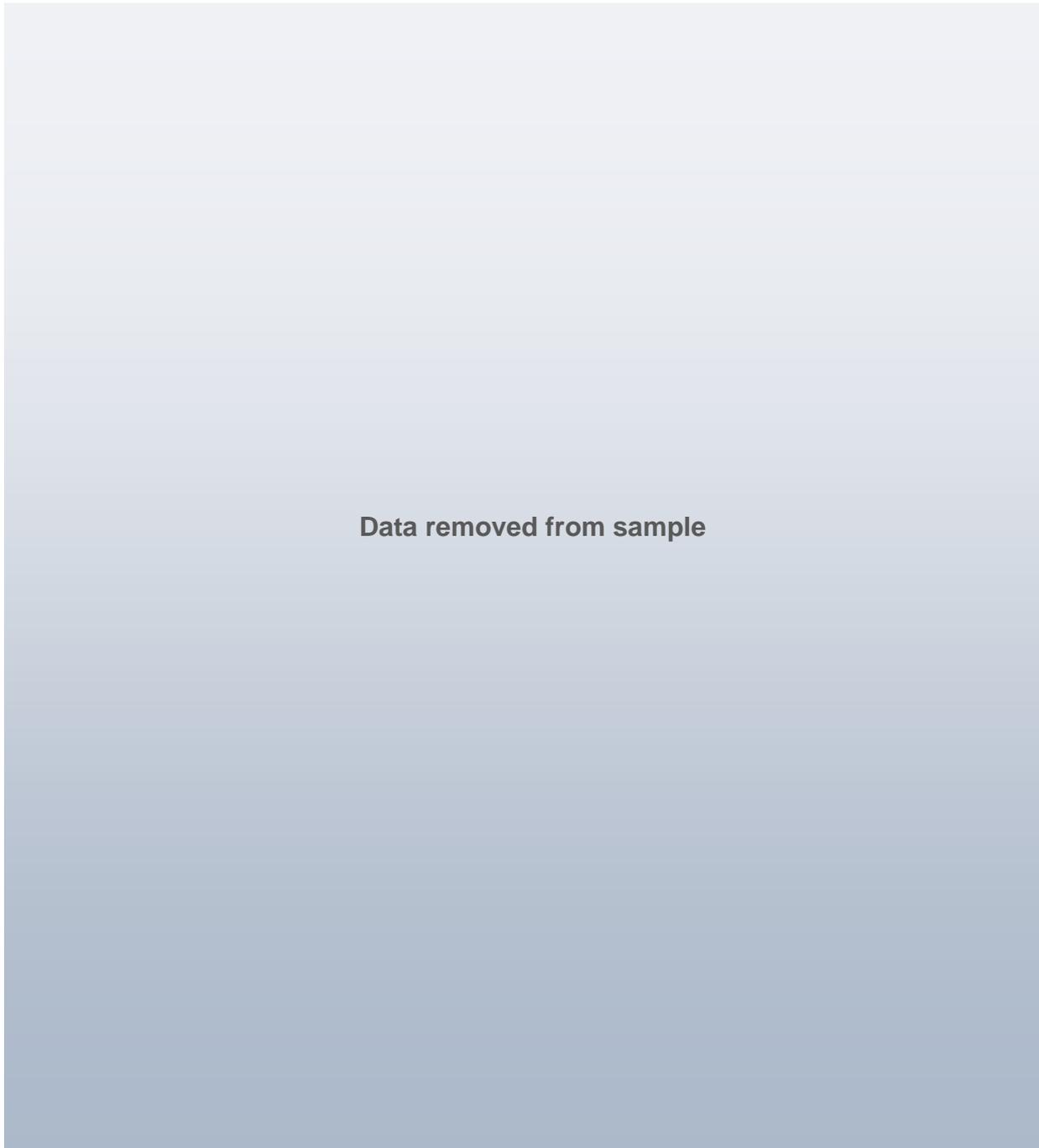
Table 96 NBO Company Shares of Paediatric Consumer Health: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
	Data removed from sample				

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 97 LBN Brand Shares of Paediatric Consumer Health: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021

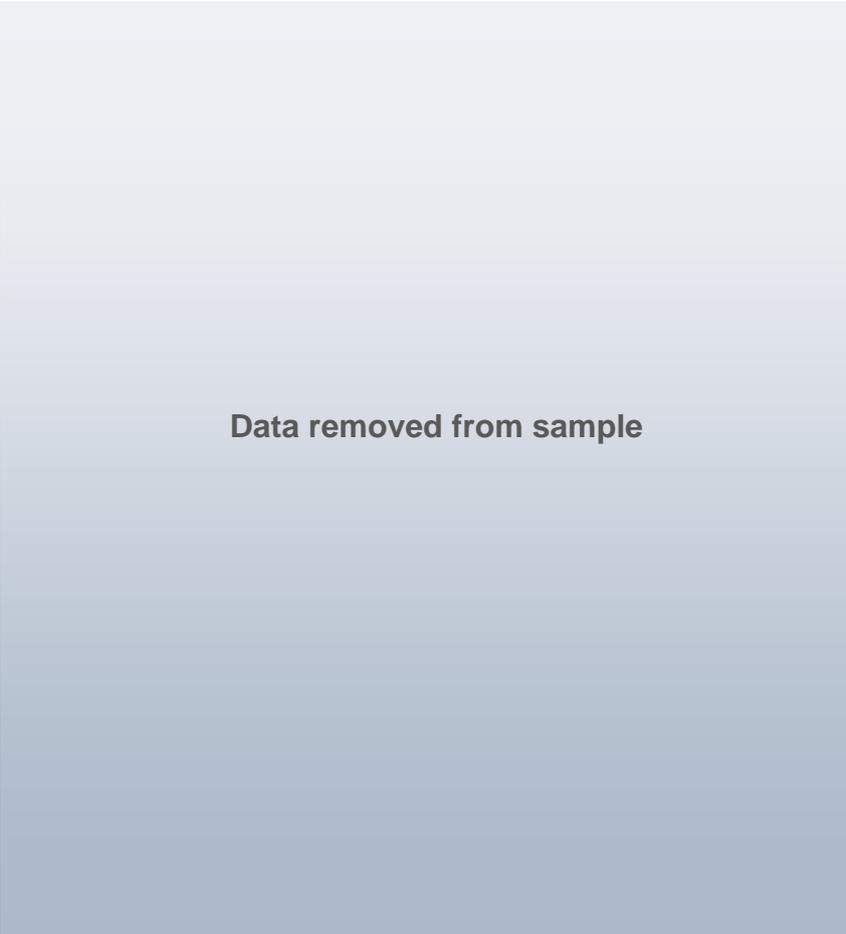


Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 98 Forecast Sales of Paediatric Consumer Health by Category: Value 2021-2026

MAD million	2021	2022	2023	2024	2025	2026
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- Paediatric Analgesics
 - Paediatric Acetaminophen
 - Paediatric Aspirin
 - Paediatric Combination Products - Analgesics
 - Paediatric Dipyrene
 - Paediatric Ibuprofen
 - Paediatric Naproxen
- Paediatric Cough, Cold and Allergy Remedies
 - Paediatric Allergy Remedies
 - Paediatric Cough/Cold Remedies
- Paediatric Digestive Remedies
 - Paediatric Diarrhoeal Remedies
 - Paediatric Indigestion and Heartburn Remedies
 - Paediatric Laxatives
 - Paediatric Motion Sickness Remedies
- Paediatric Dermatologicals
- Nappy (Diaper) Rash Treatments
- Paediatric Vitamins and Dietary Supplements
- Paediatric Consumer Health



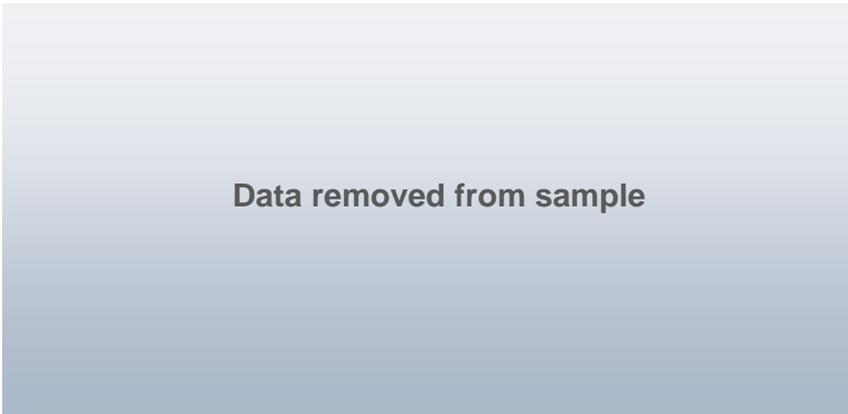
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources
 Note: 2021 data is provisional and based on part-year estimates

Table 99 Forecast Sales of Paediatric Consumer Health by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Paediatric Analgesics
 - Paediatric Acetaminophen
 - Paediatric Aspirin
 - Paediatric Combination Products - Analgesics
 - Paediatric Dipyrene
 - Paediatric Ibuprofen
 - Paediatric Naproxen
- Paediatric Cough, Cold and Allergy Remedies
 - Paediatric Allergy Remedies
 - Paediatric Cough/Cold Remedies
- Paediatric Digestive Remedies
 - Paediatric Diarrhoeal Remedies



- Paediatric Indigestion and Heartburn Remedies
- Paediatric Laxatives
- Paediatric Motion Sickness Remedies
- Paediatric Dermatologicals
- Nappy (Diaper) Rash Treatments
- Paediatric Vitamins and Dietary Supplements
- Paediatric Consumer Health

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates