



Passport

Tobacco in Morocco

Euromonitor International

June 2021

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LIST OF CONTENTS AND TABLES

Tobacco in Morocco - Industry Overview	1
EXECUTIVE SUMMARY	1
COVID-19 impact on tobacco	1
COVID-19 country impact	1
Company response	2
Retailing shift	2
What next for tobacco?	2
OPERATING ENVIRONMENT	3
Legislation	3
Summary 1 Legislation Summary at a Glance	3
Minimum legal smoking age	3
Smoking prevalence	3
Plain packaging	3
Advertising and sponsorship	3
Point-of-sale display bans	3
Smoking in public places	4
Flavoured tobacco product ban	4
Vapour products	4
PRODUCTION/IMPORTS/EXPORTS	4
MARKET INDICATORS	4
Table 1 Number of Adult Smokers by Gender 2015-2020	4
MARKET DATA	5
Table 2 Sales of Tobacco by Category: Volume 2015-2020	5
Table 3 Sales of Tobacco by Category: Value 2015-2020	5
Table 4 Sales of Tobacco by Category: % Volume Growth 2015-2020	5
Table 5 Sales of Tobacco by Category: % Value Growth 2015-2020	6
Table 6 Forecast Sales of Tobacco by Category: Volume 2020-2025	6
Table 7 Forecast Sales of Tobacco by Category: Value 2020-2025	6
Table 8 Forecast Sales of Tobacco by Category: % Volume Growth 2020- 2025	7
Table 9 Forecast Sales of Tobacco by Category: % Value Growth 2020-2025	7
GLOBAL MACROECONOMIC ENVIRONMENT	7
GLOBAL INDUSTRY ENVIRONMENT	8
DISCLAIMER	8
SOURCES	9
Summary 2 Research Sources	9
Cigarettes in Morocco - Category Analysis	12
KEY DATA FINDINGS	12
2020 IMPACT	12
Affordability remains key purchasing factor with increasing taxes putting pressure on retail volume sales	12
Accessibility limits volume sales with consumers shifting towards hypermarkets	12
Société Marocaines des Tabacs retains dominance as consumers shift towards Gauloises .	13
RECOVERY AND OPPORTUNITIES	13
Heightened health concerns anticipated to lead to consumers seeking alternatives	13

Tax increases set to continue restricting category volume sales	13
Illicit trade to continue gaining notable share despite expected government efforts to control it	13
TAXATION AND PRICING	14
Taxation rates	14
Summary 3 Taxation and Duty Levies 2015-2020.....	14
Average cigarette pack price breakdown.....	14
Summary 4 Average Cigarette Pack Price Breakdown: Brand Examples	14
CATEGORY DATA.....	14
Table 10 Sales of Cigarettes: Volume 2015-2020.....	15
Table 11 Sales of Cigarettes by Category: Value 2015-2020	15
Table 12 Sales of Cigarettes: % Volume Growth 2015-2020	15
Table 13 Sales of Cigarettes by Category: % Value Growth 2015-2020.....	15
Table 14 Sales of Cigarettes by Blend: % Volume 2015-2020.....	15
Table 15 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2015-2020	16
Table 16 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2015-2020.....	16
Table 17 Sales of Cigarettes by Pack Size: % Volume 2015-2020	16
Table 18 Sales of Cigarettes by Price Band: % Volume 2015-2020	16
Table 19 NBO Company Shares of Cigarettes: % Volume 2016-2020	17
Table 20 LBN Brand Shares of Cigarettes: % Volume 2017-2020.....	17
Table 21 Sales of Cigarettes by Distribution Format: % Volume 2015-2020.....	18
Table 22 Illicit Trade Estimate of Cigarettes: Volume 2015-2020.....	19
Table 23 Forecast Sales of Cigarettes: Volume 2020-2025.....	19
Table 24 Forecast Sales of Cigarettes by Category: Value 2020-2025.....	19
Table 25 Forecast Sales of Cigarettes: % Volume Growth 2020-2025	20
Table 26 Forecast Sales of Cigarettes by Category: % Value Growth 2020-2025	20
Table 27 Forecast Sales of Cigarettes by Blend: % Volume 2020-2025.....	20
Table 28 Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2020-2025.....	20
Table 29 Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2020-2025.....	20
Table 30 Forecast Sales of Cigarettes by Pack Size: % Volume 2020-2025	21
Table 31 Forecast Sales of Cigarettes by Price Band: % Volume 2020-2025	21
Cigars, Cigarillos and Smoking Tobacco in Morocco - Category Analysis	22
KEY DATA FINDINGS.....	22
2020 IMPACT.....	22
Luxury cigars drive strong volume declines due to little demand for home use	22
Smoking tobacco benefits from new consumption occasions at home	22
COVID-19 restrictions, not affordability, drive decline of cigar volumes sales	23
RECOVERY AND OPPORTUNITIES	23
Cigars and cigarillos set for positive performance as economy recovers	23
Return of socialising set to boost category sales; price hikes expected to inflate current value growth.....	23
Bazard Tobacco looks to expand its presence in pipe tobacco as Société Marocaines des Tabacs retreats.....	24
CATEGORY DATA.....	24

Table 32	Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2015-2020.....	24
Table 33	Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2015-2020.....	24
Table 34	Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2015-2020	25
Table 35	Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2015-2020	25
Table 36	Sales of Cigars by Size: % Volume 2015-2020.....	25
Table 37	NBO Company Shares of Cigars and Cigarillos: % Volume 2016-2020.....	25
Table 38	LBN Brand Shares of Cigars and Cigarillos: % Volume 2017-2020	26
Table 39	NBO Company Shares of Cigars: % Volume 2016-2020	27
Table 40	LBN Brand Shares of Cigars: % Volume 2017-2020.....	27
Table 41	NBO Company Shares of Smoking Tobacco: % Volume 2016-2020	28
Table 42	LBN Brand Shares of Smoking Tobacco: % Volume 2017-2020	28
Table 43	NBO Company Shares of Pipe Tobacco: % Volume 2016-2020.....	29
Table 44	LBN Brand Shares of Pipe Tobacco: % Volume 2017-2020	29
Table 45	Distribution of Cigars and Cigarillos by Format: % Volume 2015-2020.....	30
Table 46	Distribution of Smoking Tobacco by Format: % Volume 2015-2020	30
Table 47	Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2020-2025	31
Table 48	Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2020-2025	31
Table 49	Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2020-2025.....	32
Table 50	Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2020-2025.....	32
Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Morocco - Category Analysis		33
KEY DATA FINDINGS		33
2020 IMPACT		33
Economic turbulence causes consumers to transfer from cigarettes to e-vapour products		33
E-commerce remained dominant channel and benefitted from the lockdown.....		33
High fragmentation within e-vapour products with most items imported		34
RECOVERY AND OPPORTUNITIES		34
Slowed growth expected for e-vapour products as some consumers return to cigarettes and cigars		34
Development through mass appeal needed to sustain category growth.....		34
Expected tax increases and price hikes to have A negative impact on category		34
CATEGORY INDICATORS		35
Table 51	Number of Adult Vapers 2015-2020.....	35
CATEGORY DATA		35
Table 52	Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2015-2020.....	35
Table 53	Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2015-2020	36
Table 54	Sales of E-Liquids by Nicotene Strength: % Value 2018-2020.....	36
Table 55	Distribution of E-Vapour Products by Format: % Value 2015-2020.....	37

Table 56	Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2020-2025	37
Table 57	Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2020-2025.....	38
Tobacco Free Oral Nicotine in Morocco - Category Analysis		40
2020 IMPACT		40

TOBACCO IN MOROCCO - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

COVID-19 impact on tobacco

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COVID-19 country impact

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Company response

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Retailing shift

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What next for tobacco?

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OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 1 Legislation Summary at a Glance

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Source: Euromonitor International

Minimum legal smoking age

- The minimum legal smoking age in Morocco is 18.

Smoking prevalence

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Plain packaging

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Advertising and sponsorship

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Point-of-sale display bans

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Smoking in public places

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Flavoured tobacco product ban

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Vapour products

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PRODUCTION/IMPORTS/EXPORTS

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MARKET INDICATORS

Table 1 Number of Adult Smokers by Gender 2015-2020

	2015	2016	2017	2018	2019	2020
Male Number of Smokers ('000)	Data removed from sample					
Female Number of Smokers ('000)						
Total Number of Smokers ('000)						
Male Number of Smokers (%)						
Female Number of Smokers (%)						
Total Number of Smokers (%)						
Total Number of Smokers (%)						

Source: Euromonitor International from official statistics

MARKET DATA

Table 2 Sales of Tobacco by Category: Volume 2015-2020

	2015	2016	2017	2018	2019	2020
Cigarettes (million sticks)	Data removed from sample					
Cigars and Cigarillos (million units)						
Smoking Tobacco (Tonne)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						
Smokeless Tobacco (Tonne)						
Tobacco Free Oral Nicotine (million units)						

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

Table 3 Sales of Tobacco by Category: Value 2015-2020

MAD million	2015	2016	2017	2018	2019	2020
Cigarettes Including Fine Cut Stick Equivalent	Data removed from sample					
Fine Cut Cigarettes						
Cigarettes						
Cigars and Cigarillos						
Smoking Tobacco						
Cigars, Cigarillos and Smoking Tobacco						
Smokeless Tobacco						
E-Vapour Products						
Heated Tobacco Products						
Tobacco Free Oral Nicotine						
Smokeless Tobacco, E-Vapour Products and Heated Tobacco						
Tobacco						

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

Table 4 Sales of Tobacco by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Cigarettes	Data removed from sample		
Cigars and Cigarillos			
Smoking Tobacco			
Cigars, Cigarillos and Smoking Tobacco			
Smokeless Tobacco			

Tobacco Free Oral Nicotine

Data removed from sample

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

Table 5 Sales of Tobacco by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Cigarettes Including Fine Cut Stick Equivalent	Data removed from sample		
Fine Cut Cigarettes			
Cigarettes			
Cigars and Cigarillos			
Smoking Tobacco			
Cigars, Cigarillos and Smoking Tobacco			
Smokeless Tobacco			
E-Vapour Products			
Heated Tobacco Products			
Tobacco Free Oral Nicotine			
Smokeless Tobacco, E-Vapour Products and Heated Tobacco			
Tobacco			

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

Table 6 Forecast Sales of Tobacco by Category: Volume 2020-2025

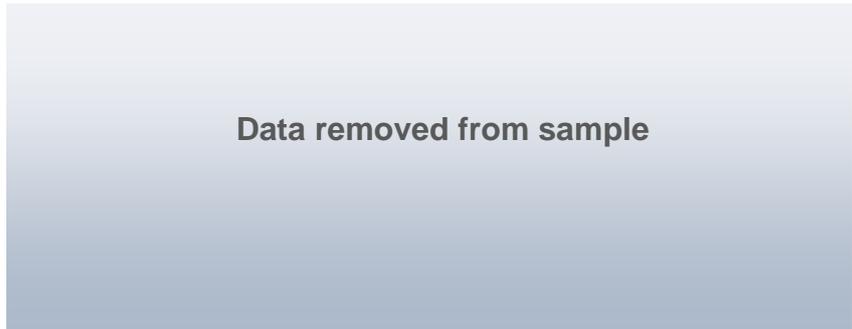
	2020	2021	2022	2023	2024	2025
Cigarettes (million sticks)	Data removed from sample					
Cigars and Cigarillos (million units)						
Smoking Tobacco (Tonne)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						
Smokeless Tobacco (Tonne)						
Tobacco Free Oral Nicotine (million units)						

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

Table 7 Forecast Sales of Tobacco by Category: Value 2020-2025

MAD million	2020	2021	2022	2023	2024	2025
Cigarettes Including Fine Cut Stick Equivalent	Data removed from sample					
Fine Cut Cigarettes						
Cigarettes						
Cigars and Cigarillos						
Smoking Tobacco						

Cigars, Cigarillos and Smoking Tobacco
 Smokeless Tobacco
 E-Vapour Products
 Heated Tobacco Products
 Tobacco Free Oral Nicotine
 Smokeless Tobacco, E-Vapour Products and Heated Tobacco
 Tobacco



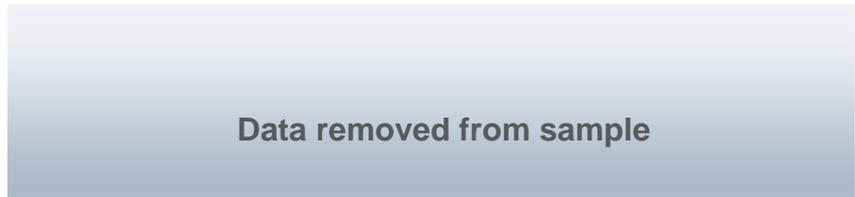
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 8 Forecast Sales of Tobacco by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Cigarettes
 Cigars and Cigarillos
 Smoking Tobacco
 Cigars, Cigarillos and Smoking Tobacco
 Smokeless Tobacco
 Tobacco Free Oral Nicotine



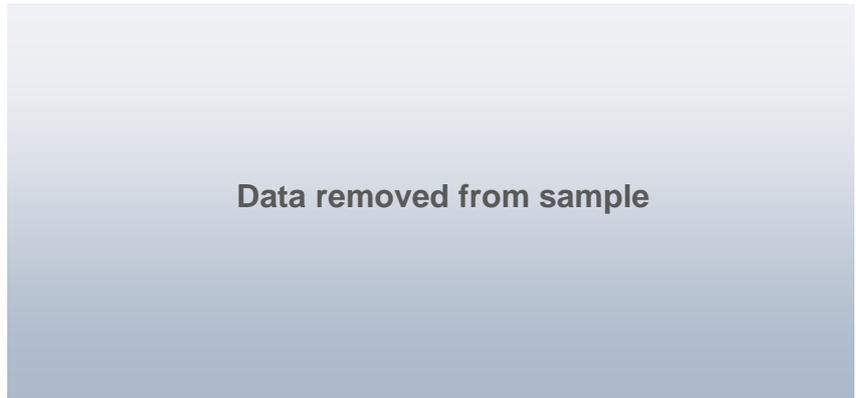
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Tobacco by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Cigarettes Including Fine Cut Stick Equivalent
 Fine Cut Cigarettes
 Cigarettes
 Cigars and Cigarillos
 Smoking Tobacco
 Cigars, Cigarillos and Smoking Tobacco
 Smokeless Tobacco
 E-Vapour Products
 Heated Tobacco Products
 Tobacco Free Oral Nicotine
 Smokeless Tobacco, E-Vapour Products and Heated Tobacco
 Tobacco



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

GLOBAL MACROECONOMIC ENVIRONMENT

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GLOBAL INDUSTRY ENVIRONMENT

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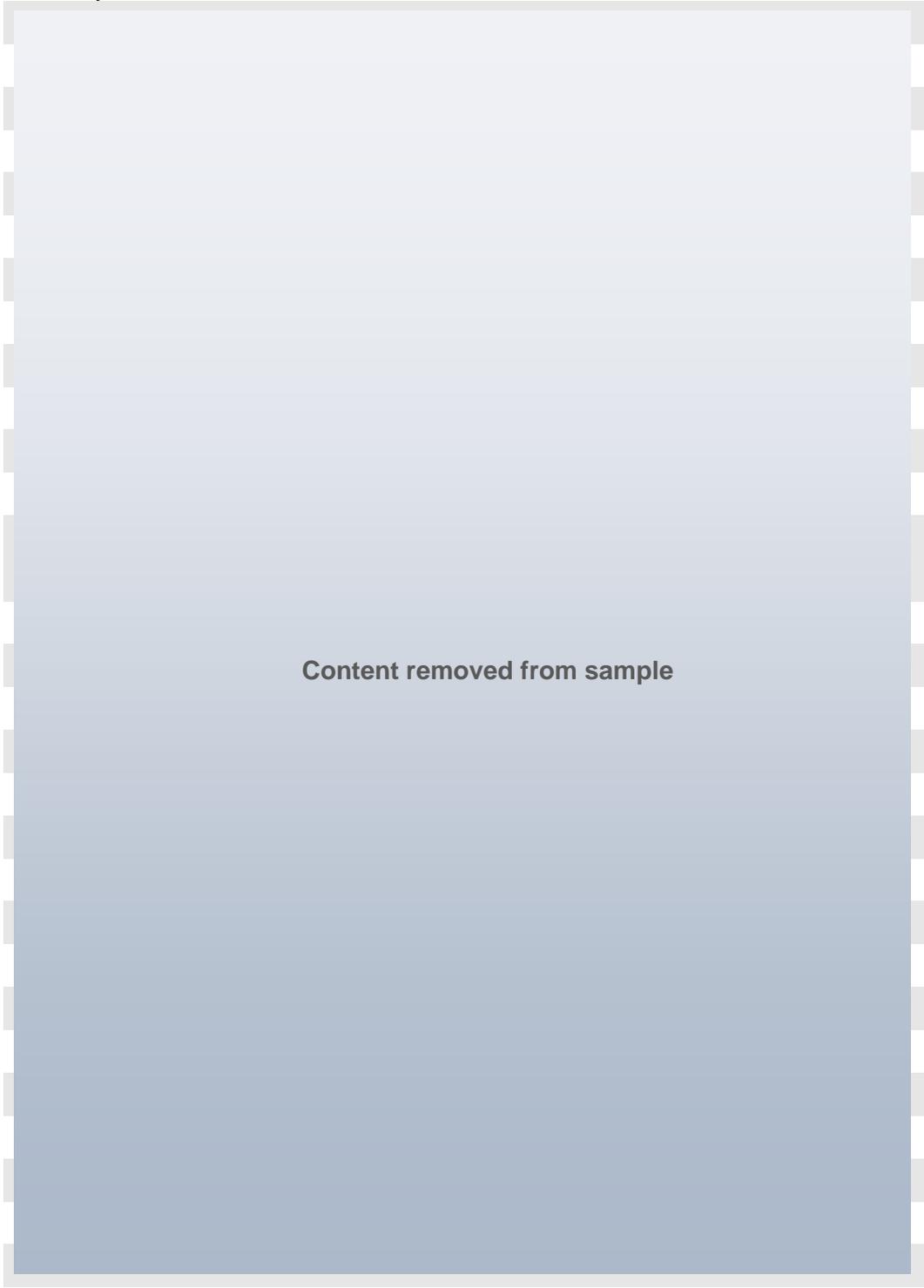
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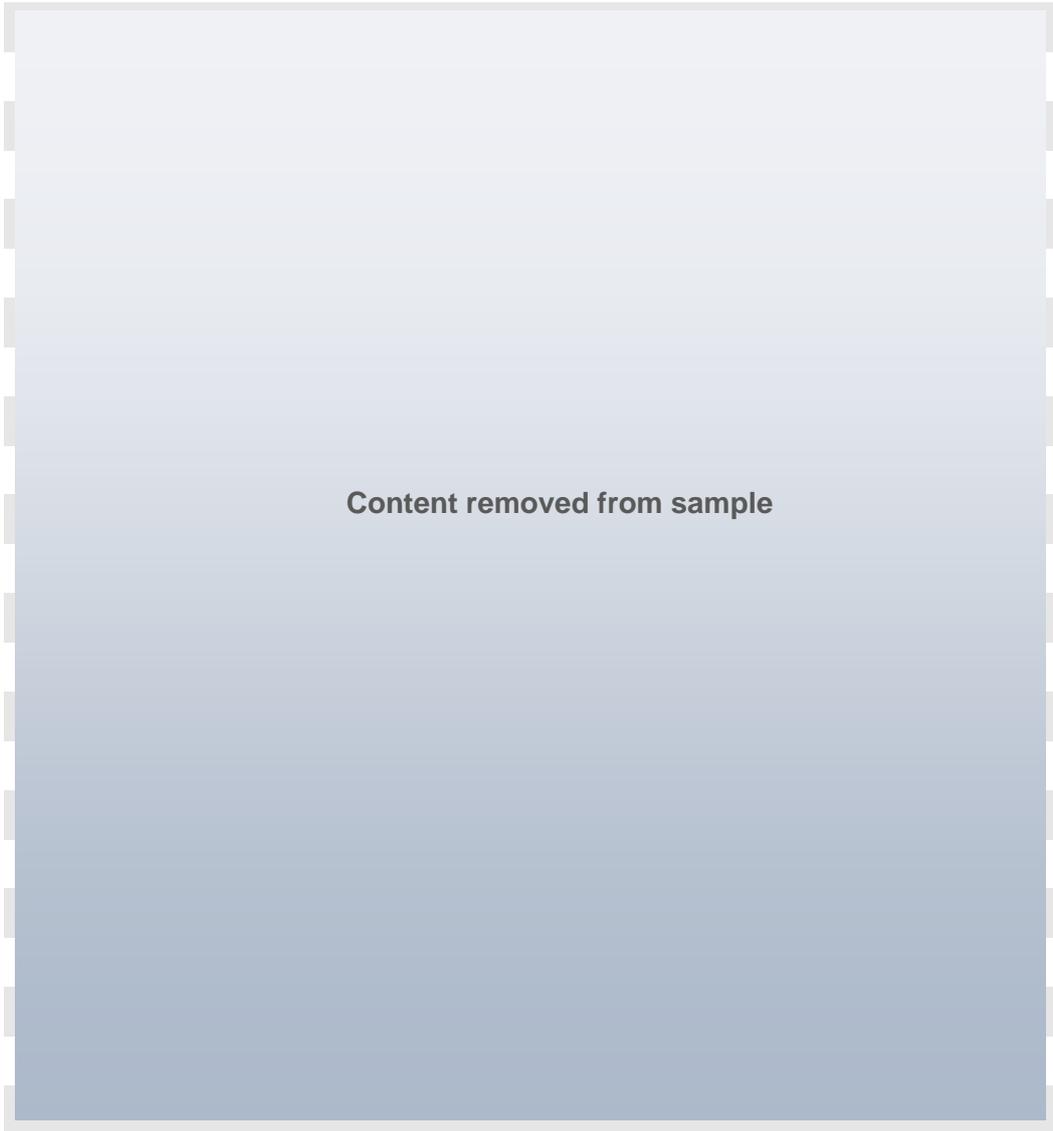
SOURCES

Sources used during research include the following:

Summary 2 Research Sources



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Source: Euromonitor International

CIGARETTES IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2020 IMPACT

Affordability remains key purchasing factor with increasing taxes putting pressure on retail volume sales

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Accessibility limits volume sales with consumers shifting towards supermarkets

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Société Marocaines des Tabacs retains dominance as consumers shift towards Gauloises

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RECOVERY AND OPPORTUNITIES

Heightened health concerns anticipated to lead to consumers seeking alternatives

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Tax increases set to continue restricting category volume sales

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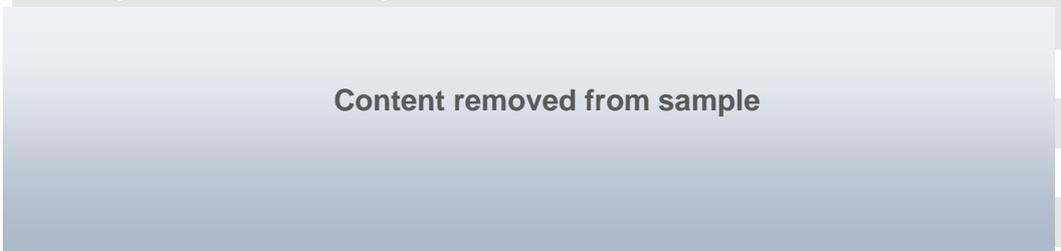
Illicit trade to continue gaining notable share despite expected government efforts to control it

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TAXATION AND PRICING

Taxation rates

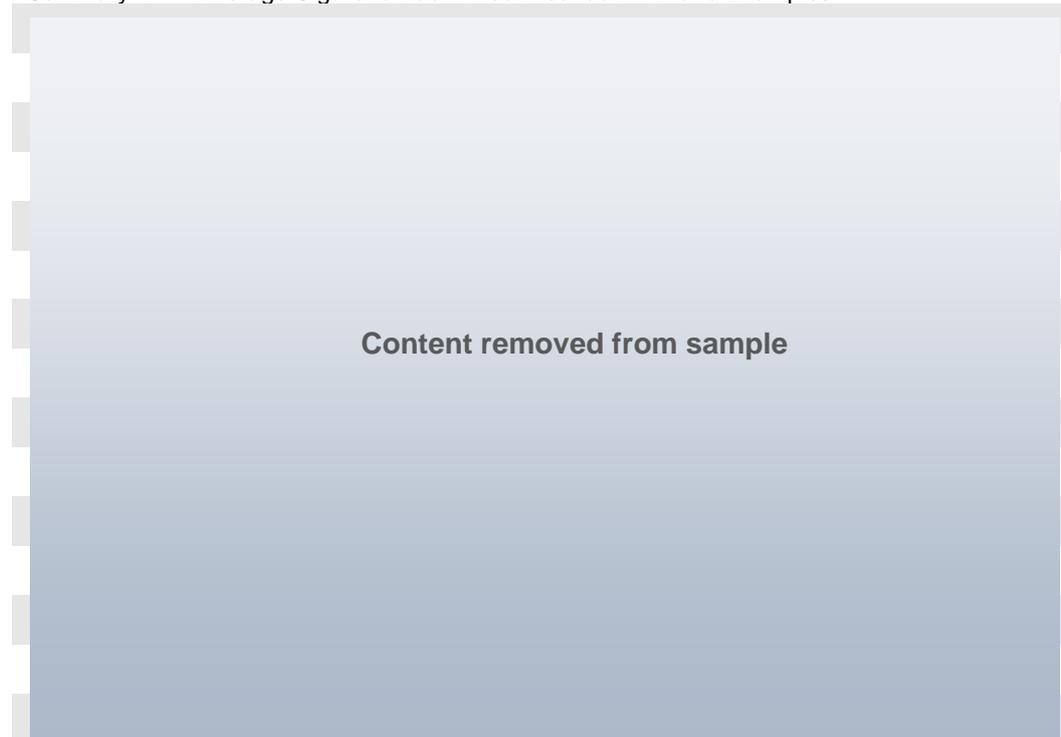
Summary 3 Taxation and Duty Levies 2015-2020



Source: Euromonitor International

Average cigarette pack price breakdown

Summary 4 Average Cigarette Pack Price Breakdown: Brand Examples



Source: Calculated from storecheck data and Taxation and Duty Levies Table.

CATEGORY DATA

Table 10 Sales of Cigarettes: Volume 2015-2020

million sticks

	2015	2016	2017	2018	2019	2020
Cigarettes	Data removed from sample					

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

Table 11 Sales of Cigarettes by Category: Value 2015-2020

MAD million

	2015	2016	2017	2018	2019	2020
Cigarettes Including Fine Cut Stick Equivalent Fine Cut Cigarettes Cigarettes	Data removed from sample					

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

Table 12 Sales of Cigarettes: % Volume Growth 2015-2020

% volume growth

	2019/20	2015-20 CAGR	2015/20 Total
Cigarettes	Data removed from sample		

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

Table 13 Sales of Cigarettes by Category: % Value Growth 2015-2020

% current value growth

	2019/20	2015-20 CAGR	2015/20 Total
Cigarettes Including Fine Cut Stick Equivalent Fine Cut Cigarettes Cigarettes	Data removed from sample		

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

Table 14 Sales of Cigarettes by Blend: % Volume 2015-2020

% retail volume

	2015	2016	2017	2018	2019	2020
American Blend Virginia Other Blend Total	Data removed from sample					

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

Table 15 Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Standard (non-capsule/ non-menthol)	Data removed from sample					
Flavour Capsule (all flavours)						
Menthol (non-capsule)						
Total						

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

Table 16 Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Regular	Data removed from sample					
Slim						
Superslim						
Microslim						
Total						

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

Table 17 Sales of Cigarettes by Pack Size: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
< 20	Data removed from sample					
20s						
20 +						
Total						

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

Table 18 Sales of Cigarettes by Price Band: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Economy price band	Data removed from sample					
Mid price band						
Premium price band						
Total						

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

Table 19 NBO Company Shares of Cigarettes: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
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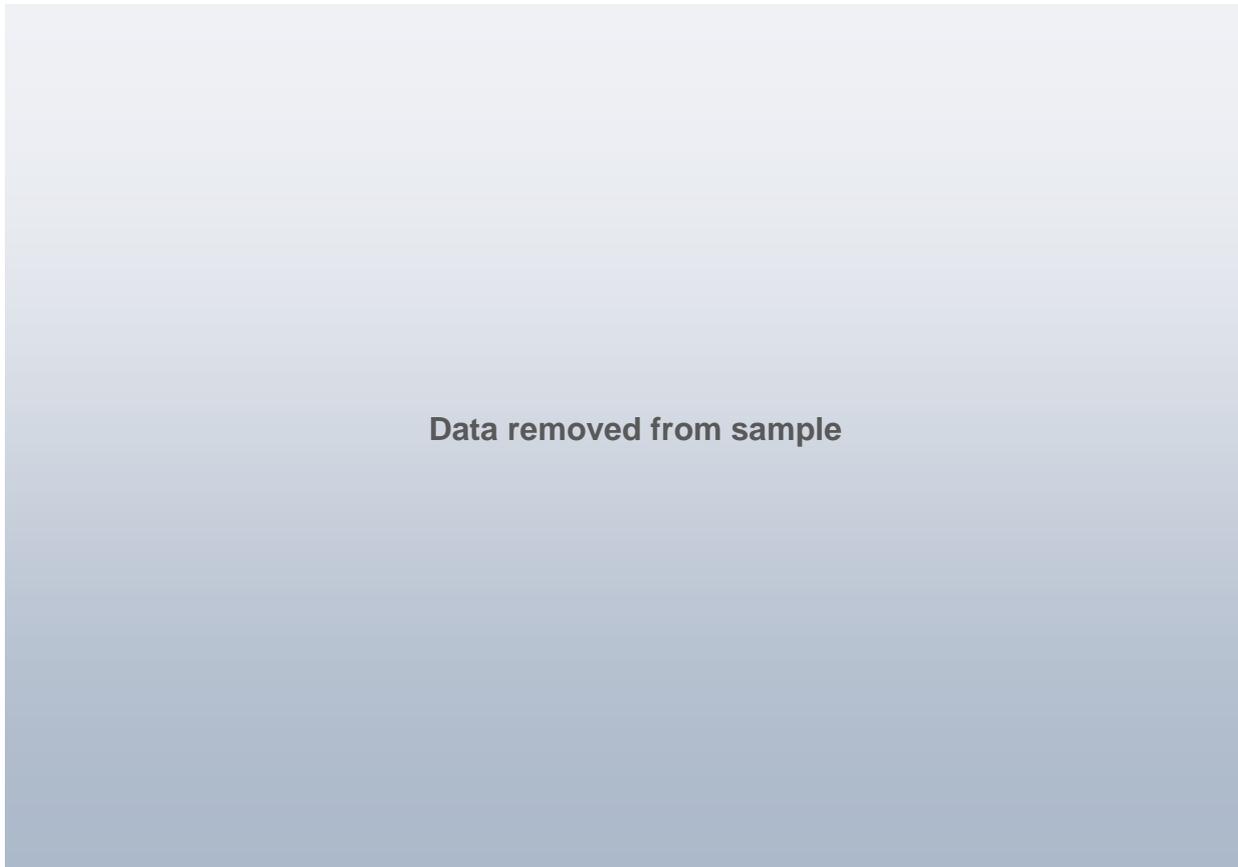
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 20 LBN Brand Shares of Cigarettes: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------

Data removed from sample



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

Table 21 Sales of Cigarettes by Distribution Format: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Food/drink/tobacco specialists						
--- Food/drink specialists						
--- Tobacco specialists						
-- Independent Small Grocers						
-- Other Grocery Retailers						

- Newsagent-tobacconists/kiosks
- Street vendors
- Mixed Retailers
- Department Stores
- Other Mixed Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- E-Commerce
- Non-retail channels
- Bar-tobacconists
- Hotels/restaurants/bars
- Total



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

Table 22 Illicit Trade Estimate of Cigarettes: Volume 2015-2020

million sticks	2015	2016	2017	2018	2019	2020
Legal sales	Data removed from sample					
Illicit trade						
% penetration of illicit trade						
Actual consumption						

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

Table 23 Forecast Sales of Cigarettes: Volume 2020-2025

million sticks	2020	2021	2022	2023	2024	2025
Cigarettes	Data removed from sample					

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

Table 24 Forecast Sales of Cigarettes by Category: Value 2020-2025

MAD million	2020	2021	2022	2023	2024	2025
Cigarettes Including Fine Cut Stick Equivalent	Data removed from sample					
Fine Cut Cigarettes						
Cigarettes						

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

Table 25 Forecast Sales of Cigarettes: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

Cigarettes

Data removed from sample

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

Table 26 Forecast Sales of Cigarettes by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

Cigarettes Including Fine Cut Stick
Equivalent
Fine Cut Cigarettes
Cigarettes**Data removed from sample**

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

Table 27 Forecast Sales of Cigarettes by Blend: % Volume 2020-2025

% retail volume

2020 2021 2022 2023 2024 2025

American Blend
Virginia
Other Blend
Total**Data removed from sample**

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

Table 28 Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2020-2025

% retail volume

2020 2021 2022 2023 2024 2025

Standard (non-capsule/
non-menthol)
Flavour Capsule (all
flavours)
Menthol (non-capsule)
Total**Data removed from sample**

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

Table 29 Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2020-2025

% retail volume

	2020	2021	2022	2023	2024	2025
Regular	Data removed from sample					
Slim						
Superslim						
Microslim						
Total						

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

Table 30 Forecast Sales of Cigarettes by Pack Size: % Volume 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
< 20	Data removed from sample					
20s						
20 +						
Total						

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

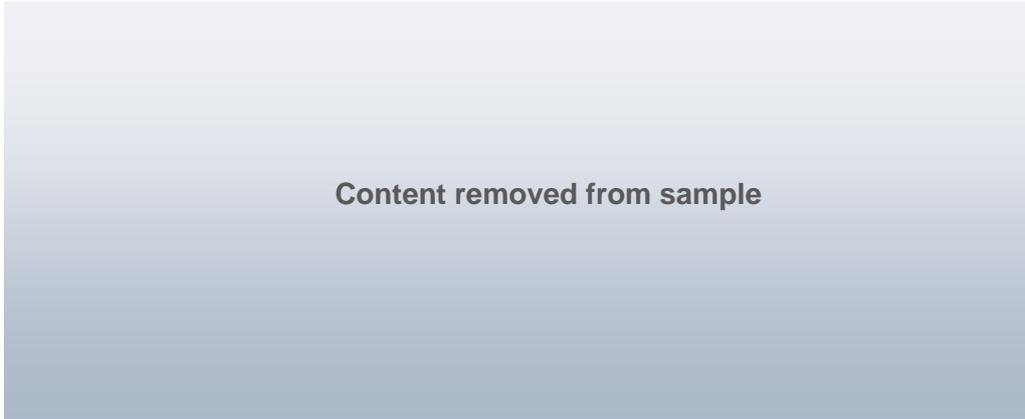
Table 31 Forecast Sales of Cigarettes by Price Band: % Volume 2020-2025

% retail volume	2020	2021	2022	2023	2024	2025
Economy price band	Data removed from sample					
Mid price band						
Premium price band						
Total						

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

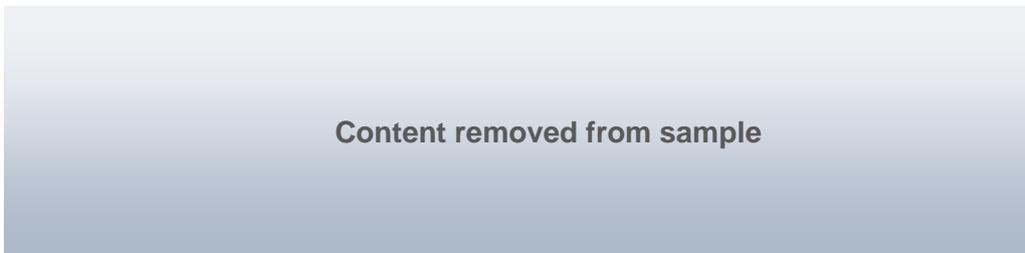
CIGARS, CIGARILLOS AND SMOKING TOBACCO IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

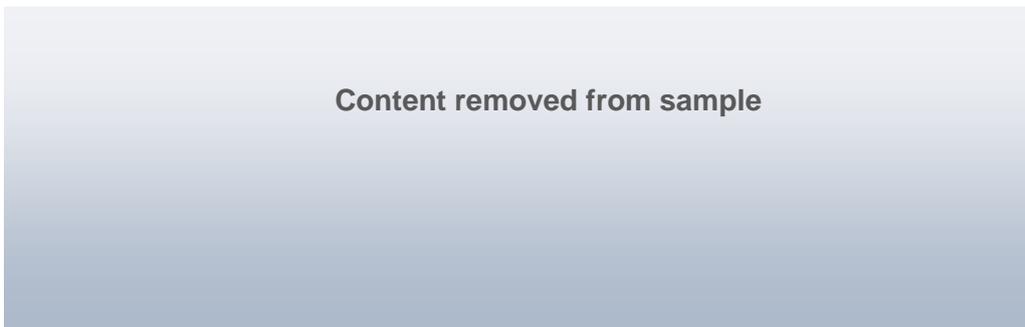


2020 IMPACT

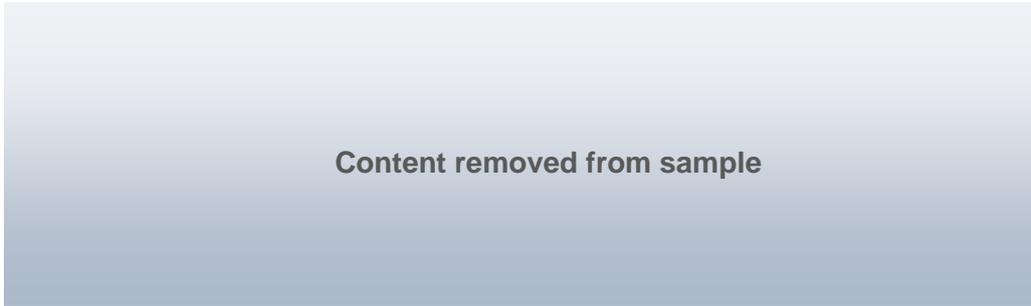
Luxury cigars drive strong volume declines due to little demand for home use



Smoking tobacco benefits from new consumption occasions at home

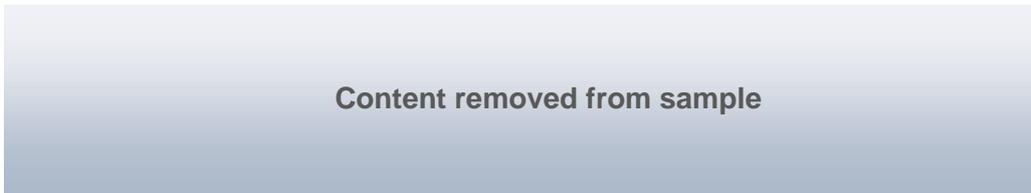


COVID-19 restrictions, not affordability, drive decline of cigar volumes sales

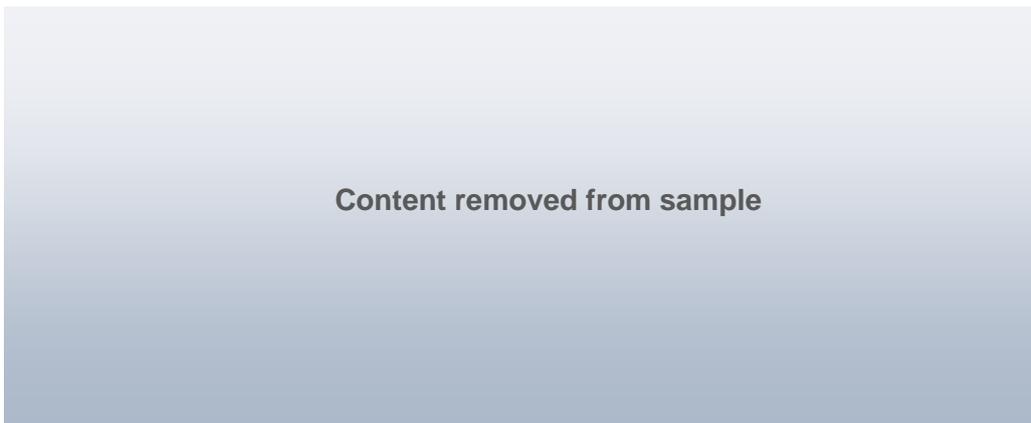


RECOVERY AND OPPORTUNITIES

Cigars and cigarillos set for positive performance as economy recovers



Return of socialising set to boost category sales; price hikes expected to inflate current value growth



Bazard Tobacco looks to expand its presence in pipe tobacco as Société Marocaines des Tabacs retreats



CATEGORY DATA

Table 32 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2015-2020

	2015	2016	2017	2018	2019	2020
Cigars and Cigarillos (million units)	Data removed from sample					
- Cigars (million units)						
- Cigarillos (million units)						
Smoking Tobacco (Tonne)						
- Pipe Tobacco (Tonne)						
- Fine Cut Tobacco (Tonne)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						

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

Table 33 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2015-2020

MAD million	2015	2016	2017	2018	2019	2020
Cigars and Cigarillos	Data removed from sample					
- Cigars						
- Cigarillos						
Smoking Tobacco						
- Pipe Tobacco						
- Fine Cut Tobacco						
Cigars, Cigarillos and Smoking Tobacco						

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

Table 34 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2015-2020

% volume growth	2019/20	2015-20 CAGR	2015/20 Total
Cigars and Cigarillos	Data removed from sample		
- Cigars			
- Cigarillos			
Smoking Tobacco			
- Pipe Tobacco			
- Fine Cut Tobacco			
Cigars, Cigarillos and Smoking Tobacco			

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

Table 35 Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2015-2020

% current value growth	2019/20	2015-20 CAGR	2015/20 Total
Cigars and Cigarillos	Data removed from sample		
- Cigars			
- Cigarillos			
Smoking Tobacco			
- Pipe Tobacco			
- Fine Cut Tobacco			
Cigars, Cigarillos and Smoking Tobacco			

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

Table 36 Sales of Cigars by Size: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Large Cigars	Data removed from sample					
Standard Cigars						
Small Cigars						
Total						

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

Table 37 NBO Company Shares of Cigars and Cigarillos: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
	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 38 LBN Brand Shares of Cigars and Cigarillos: % Volume 2017-2020

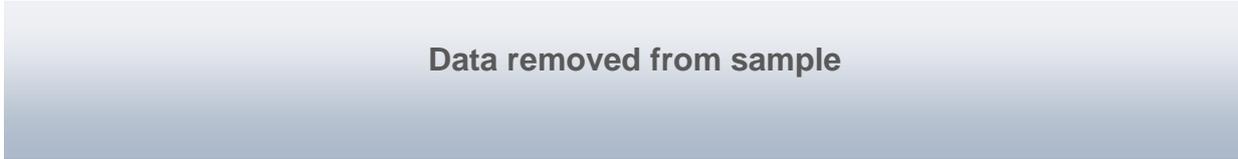
% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------

Data removed from sample

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

Table 39 NBO Company Shares of Cigars: % Volume 2016-2020

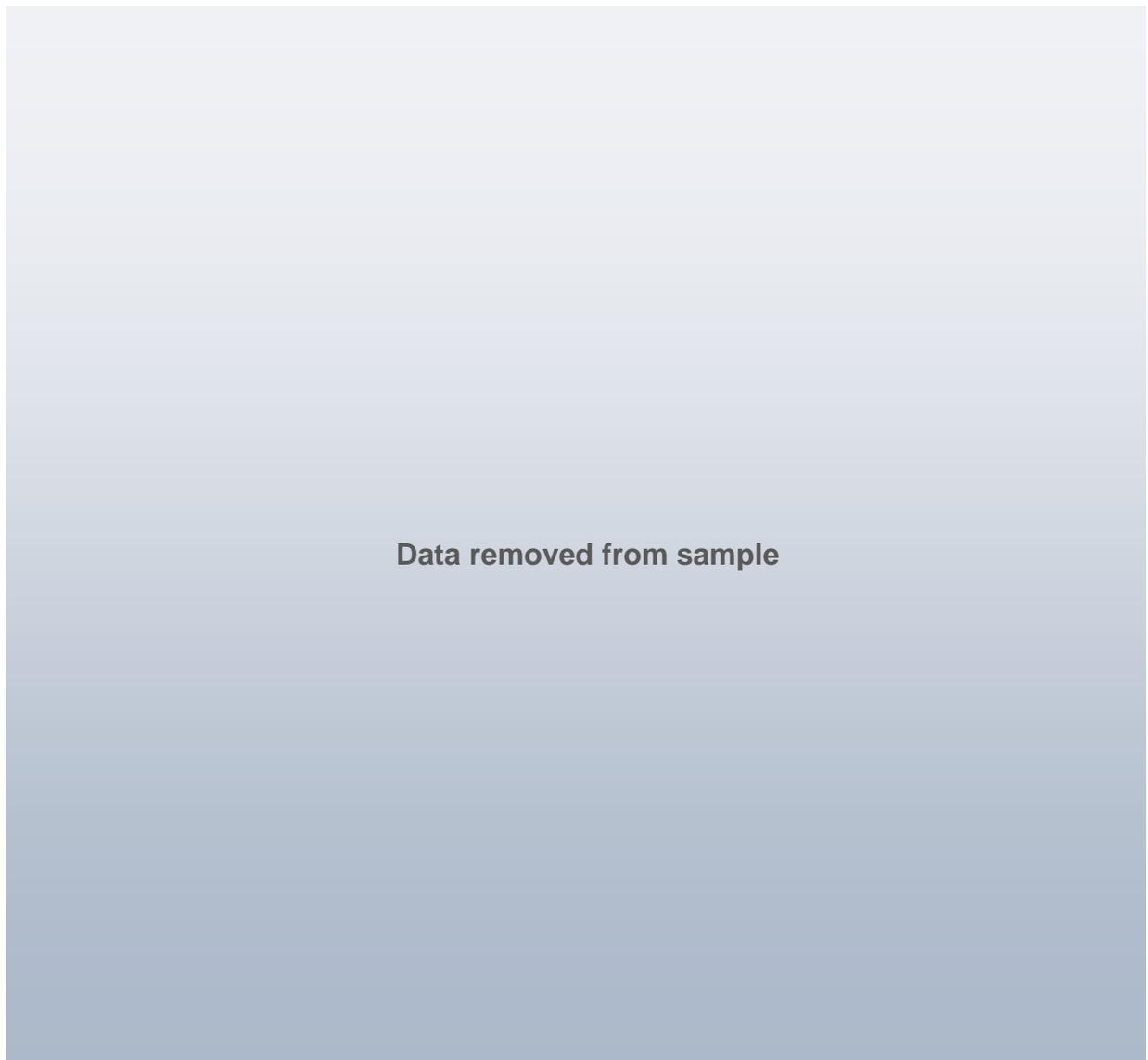
% retail volume Company	2016	2017	2018	2019	2020
----------------------------	------	------	------	------	------



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

Table 40 LBN Brand Shares of Cigars: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------

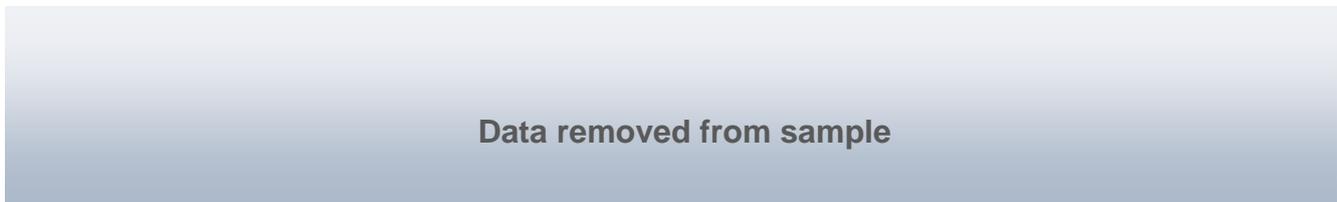




Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 41 NBO Company Shares of Smoking Tobacco: % Volume 2016-2020

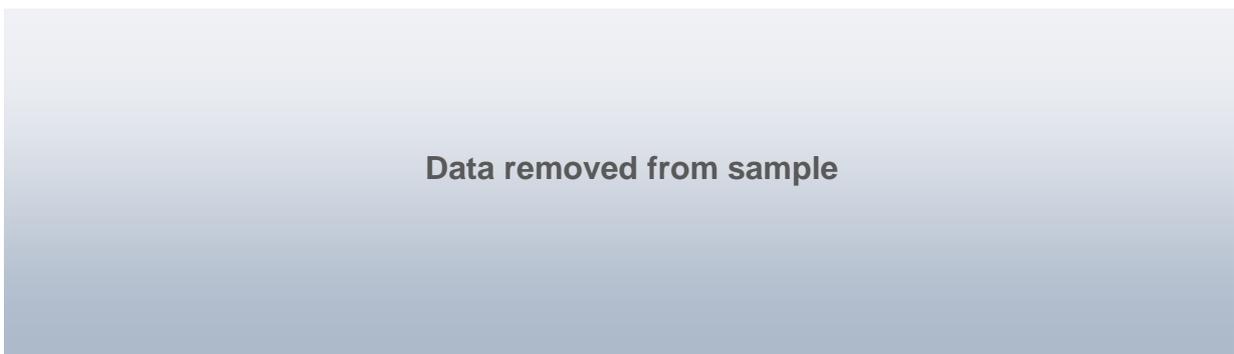
% retail volume Company	2016	2017	2018	2019	2020
----------------------------	------	------	------	------	------



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

Table 42 LBN Brand Shares of Smoking Tobacco: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------



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

Table 43 NBO Company Shares of Pipe Tobacco: % Volume 2016-2020

% retail volume Company	2016	2017	2018	2019	2020
----------------------------	------	------	------	------	------

Data removed from sample

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

Table 44 LBN Brand Shares of Pipe Tobacco: % Volume 2017-2020

% retail volume Brand (GBO)	Company (NBO)	2017	2018	2019	2020
--------------------------------	---------------	------	------	------	------

Data removed from sample

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

Table 45 Distribution of Cigars and Cigarillos by Format: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Food/drink/tobacco specialists						
--- Food/drink specialists						
--- Tobacco specialists						
-- Independent Small Grocers						
-- Other Grocery Retailers						
--- Newsagent-tobacconists/kiosks						
--- Street vendors						
- Mixed Retailers						
-- Department Stores						
-- Other Mixed Retailers						
- Non-Grocery Specialists						
-- Drugstores/parapharmacies						
-- Other Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- E-Commerce						
Non-retail channels						
- Bar-tobacconists						
- Hotels/restaurants/bars						
Total						

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

Table 46 Distribution of Smoking Tobacco by Format: % Volume 2015-2020

% retail volume	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						

- Food/drink/tobacco specialists
- Food/drink specialists
- Tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Newsagent-tobacconists/kiosks
- Street vendors
- Mixed Retailers
- Department Stores
- Other Mixed Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Specialists
- Non-Store Retailing
- Vending
- E-Commerce
- Non-retail channels
- Bar-tobacconists
- Hotels/restaurants/bars
- Total



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

Table 47 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Volume 2020-2025

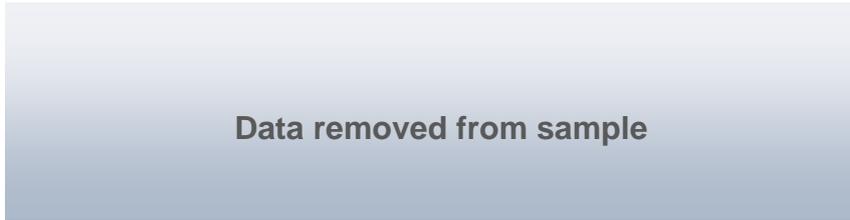
	2020	2021	2022	2023	2024	2025
Cigars and Cigarillos (million units)	Data removed from sample					
- Cigars (million units)						
- Cigarillos (million units)						
Smoking Tobacco (Tonne)						
- Pipe Tobacco (Tonne)						
- Fine Cut Tobacco (Tonne)						
Cigars, Cigarillos and Smoking Tobacco (Not calculable)						

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

Table 48 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: Value 2020-2025

MAD million	2020	2021	2022	2023	2024	2025
Cigars and Cigarillos	Data removed from sample					

- Cigars
- Cigarillos
- Smoking Tobacco
- Pipe Tobacco
- Fine Cut Tobacco
- Cigars, Cigarillos and Smoking Tobacco



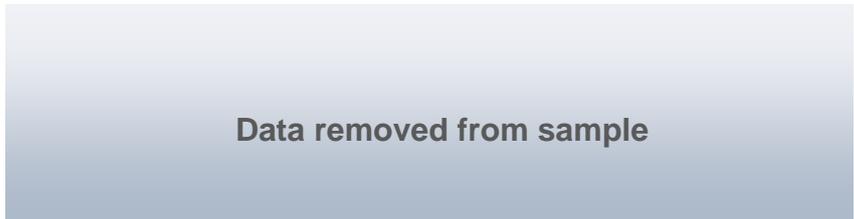
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 49 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Volume Growth 2020-2025

% volume growth

2020/21 2020-25 CAGR 2020/25 Total

- Cigars and Cigarillos
- Cigars
- Cigarillos
- Smoking Tobacco
- Pipe Tobacco
- Fine Cut Tobacco
- Cigars, Cigarillos and Smoking Tobacco



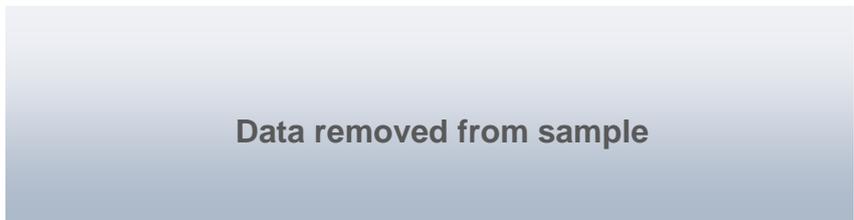
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 50 Forecast Sales of Cigars, Cigarillos and Smoking Tobacco by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

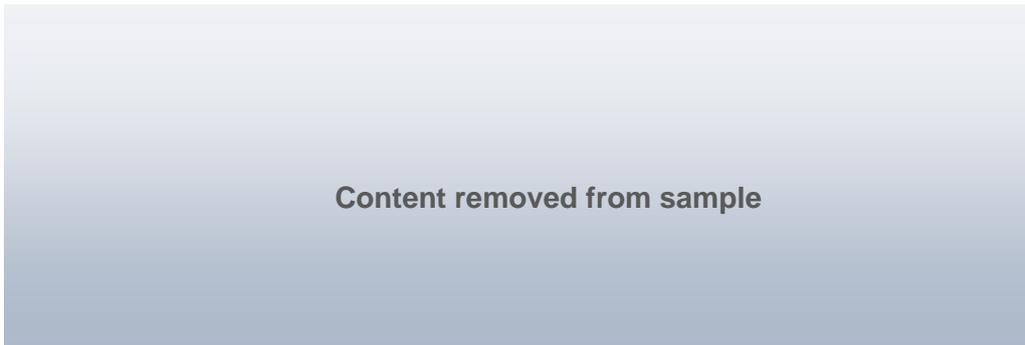
- Cigars and Cigarillos
- Cigars
- Cigarillos
- Smoking Tobacco
- Pipe Tobacco
- Fine Cut Tobacco
- Cigars, Cigarillos and Smoking Tobacco



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

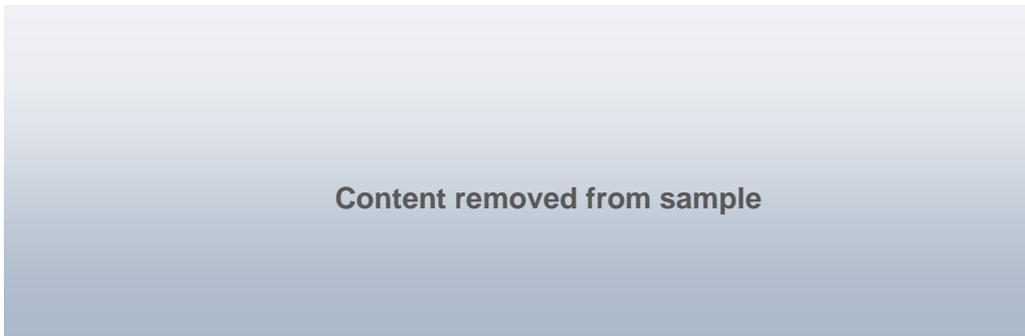
SMOKELESS TOBACCO, E-VAPOUR PRODUCTS AND HEATED TOBACCO IN MOROCCO - CATEGORY ANALYSIS

KEY DATA FINDINGS

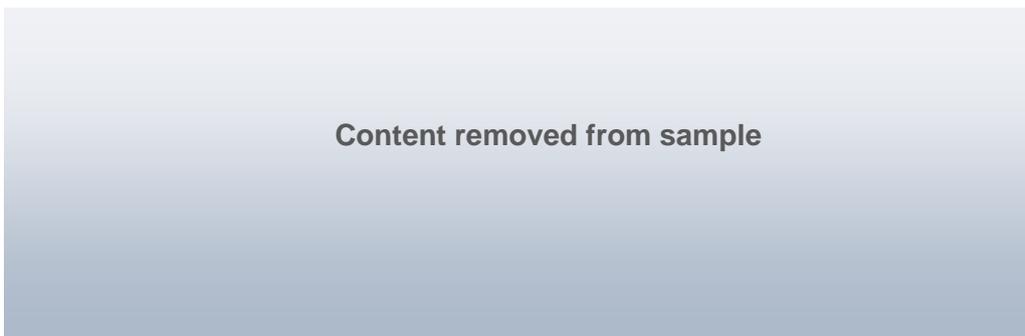


2020 IMPACT

Economic turbulence causes consumers to transfer from cigarettes to e-vapour products



E-commerce remained dominant channel and benefitted from the lockdown

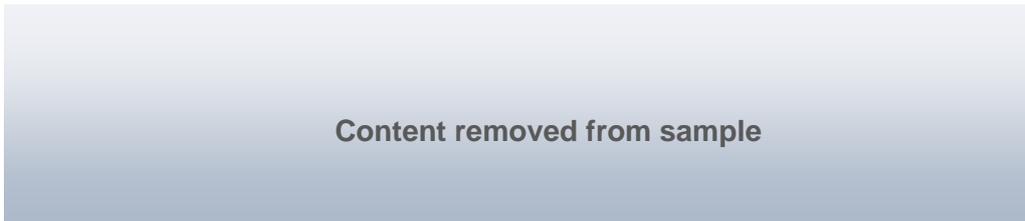


High fragmentation within e-vapour products with most items imported

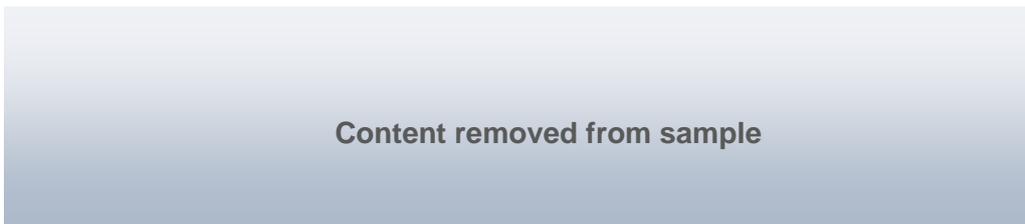


RECOVERY AND OPPORTUNITIES

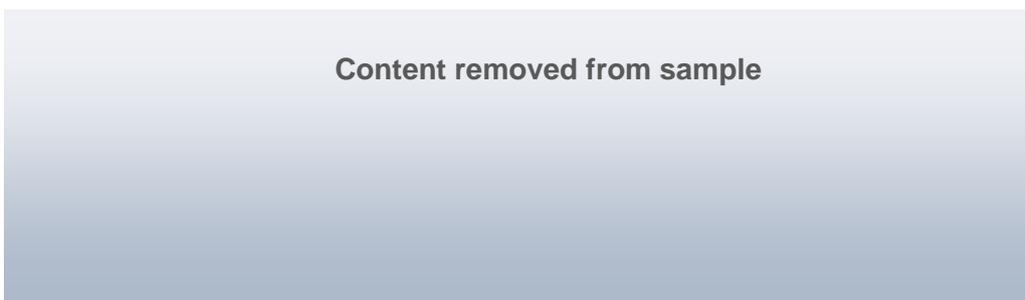
Slowed growth expected for e-vapour products as some consumers return to cigarettes and cigars



Development through mass appeal needed to sustain category growth



Expected tax increases and price hikes to have A negative impact on category



CATEGORY INDICATORS

Table 51 Number of Adult Vapers 2015-2020

	2015	2016	2017	2018	2019	2020
Male ('000)	Data removed from sample					
Female ('000)						
Total ('000)						
Male (%)						
Female (%)						
Total (%)						

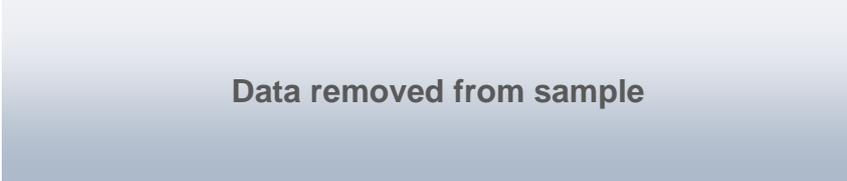
Source: Euromonitor International from official statistics

CATEGORY DATA

Table 52 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2015-2020

MAD million	2015	2016	2017	2018	2019	2020
Smokeless Tobacco	Data removed from sample					
- Chewing Tobacco						
- Moist Snuff						
-- US-Style Moist Snuff ('dip')						
--- Loose US-Style Moist Snuff						
--- Portion US-Style Moist Snuff						
-- Swedish-Style Snus						
E-Vapour Products						
- Closed Vaping Systems						
-- Cig-a-likes						
--- Single Use Cig-a-likes						
--- Rechargeable Cig-a-likes (including starter kits)						
--- Cig-a-like Cartridges						
-- Non Cig-a-like Closed System						
--- Non Cig-a-like Closed System (including starter kits)						
--- Non Cig-a-like cartridges						
- Open Vaping Systems						
-- Open Vaping Systems Charging and Vapourising Devices						
-- E-liquids						
Heated Tobacco Products						
- Tobacco Heating Devices						
- Heated Tobacco						

Tobacco Free Oral Nicotine
 - Nicotine Pouches
 Smokeless Tobacco, E-Vapour Products and Heated Tobacco



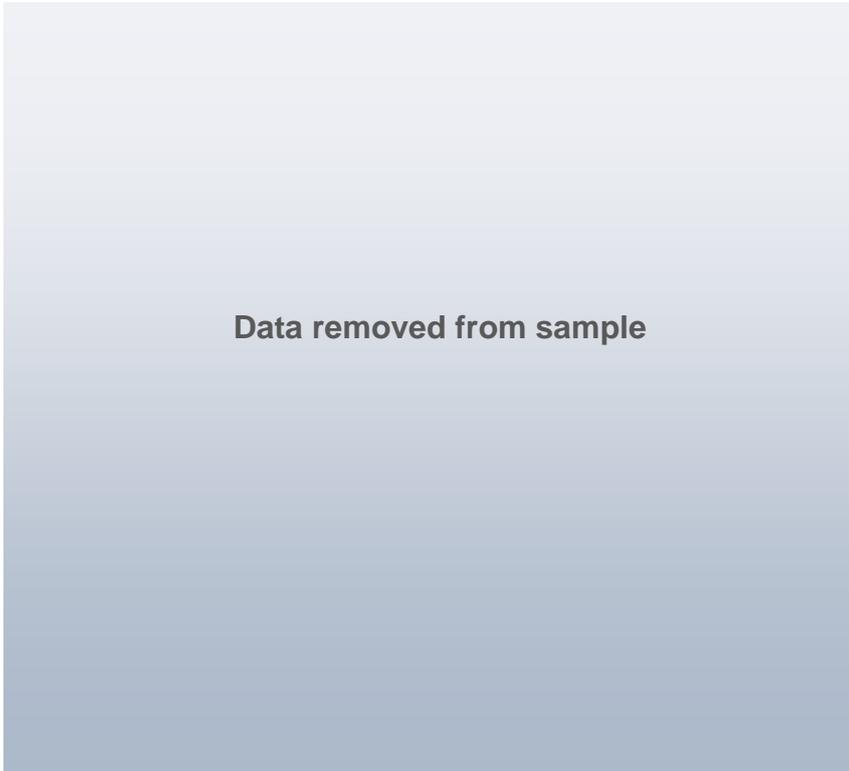
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 53 Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2015-2020

% current value growth

2019/20 2015-20 CAGR 2015/20 Total

Smokeless Tobacco
 - Chewing Tobacco
 - Moist Snuff
 -- US-Style Moist Snuff ('dip')
 --- Loose US-Style Moist Snuff
 --- Portion US-Style Moist Snuff
 -- Swedish-Style Snus
 E-Vapour Products
 - Closed Vaping Systems
 -- Cig-a-likes
 --- Single Use Cig-a-likes
 --- Rechargeable Cig-a-likes (including starter kits)
 --- Cig-a-like Cartridges
 -- Non Cig-a-like Closed System
 --- Non Cig-a-like Closed System (including starter kits)
 --- Non Cig-a-like cartridges
 - Open Vaping Systems
 -- Open Vaping Systems Charging and Vapourising Devices
 -- E-liquids
 Heated Tobacco Products
 - Tobacco Heating Devices
 - Heated Tobacco
 Tobacco Free Oral Nicotine
 - Nicotine Pouches
 Smokeless Tobacco, E-Vapour Products and Heated Tobacco



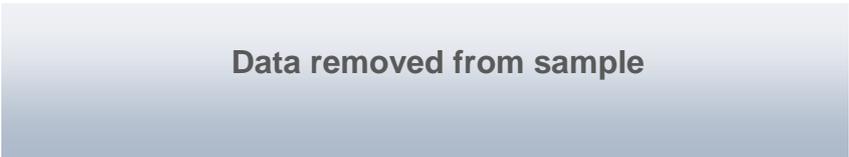
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 54 Sales of E-Liquids by Nicotene Strength: % Value 2018-2020

% retail value rsp

2018 2019 2020

0 mg/ml
 1-9 mg/ml
 10-19 mg/ml
 20+ mg/ml
 Total



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

Table 55 Distribution of E-Vapour Products by Format: % Value 2015-2020

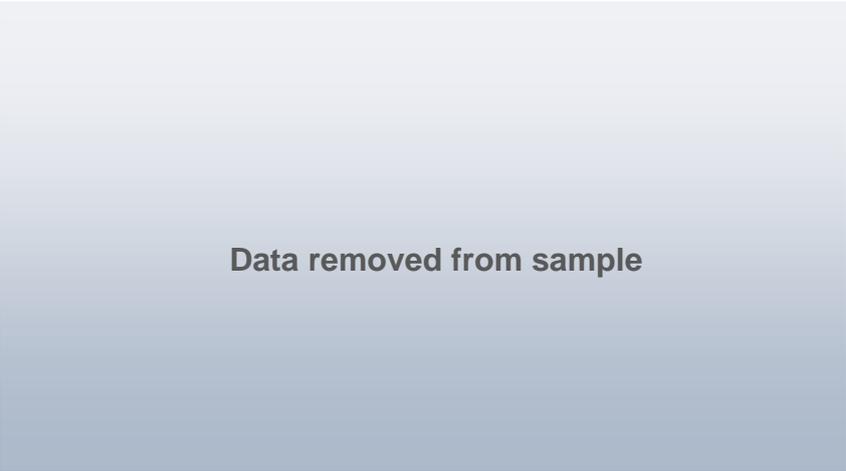
% retail value rsp	2015	2016	2017	2018	2019	2020
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						
--- Supermarkets						
-- Traditional Grocery Retailers						
- Mixed Retailers						
- Non-Grocery Specialists						
Non-Store Retailing						
- Vending						
- E-Commerce						
Total						

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

Table 56 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: Value 2020-2025

MAD million	2020	2021	2022	2023	2024	2025
Smokeless Tobacco	Data removed from sample					
- Chewing Tobacco						
- Moist Snuff						
-- US-Style Moist Snuff ('dip')						
--- Loose US-Style Moist Snuff						
--- Portion US-Style Moist Snuff						
-- Swedish-Style Snus						
E-Vapour Products						
- Closed Vaping Systems						
-- Cig-a-likes						
--- Single Use Cig-a-likes						
--- Rechargeable Cig-a-likes (including starter kits)						
--- Cig-a-like Cartridges						
-- Non Cig-a-like Closed System						
--- Non Cig-a-like Closed System						

- (including starter kits)
- Non Cig-a-like cartridges
- Open Vaping Systems
- Open Vaping Systems Charging and Vapourising Devices
- E-liquids
- Heated Tobacco Products
- Tobacco Heating Devices
- Heated Tobacco
- Tobacco Free Oral Nicotine
- Nicotine Pouches
- Smokeless Tobacco, E-Vapour Products and Heated Tobacco



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

Table 57 Forecast Sales of Smokeless Tobacco, E-Vapour Products and Heated Tobacco by Category: % Value Growth 2020-2025

% constant value growth

2020/2021 2020-25 CAGR 2020/25 Total

- Smokeless Tobacco
- Chewing Tobacco
- Moist Snuff
- US-Style Moist Snuff ('dip')
- Loose US-Style Moist Snuff
- Portion US-Style Moist Snuff
- Swedish-Style Snus
- E-Vapour Products
- Closed Vaping Systems
- Cig-a-likes
- Single Use Cig-a-likes
- Rechargeable Cig-a-likes (including starter kits)
- Cig-a-like Cartridges
- Non Cig-a-like Closed System
- Non Cig-a-like Closed System (including starter kits)
- Non Cig-a-like cartridges
- Open Vaping Systems
- Open Vaping Systems Charging and Vapourising Devices
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- Heated Tobacco Products
- Tobacco Heating Devices
- Heated Tobacco
- Tobacco Free Oral Nicotine
- Nicotine Pouches
- Smokeless Tobacco, E-Vapour Products and Heated Tobacco



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

TOBACCO FREE ORAL NICOTINE IN MOROCCO - CATEGORY ANALYSIS

2020 IMPACT

Content removed from sample