

# Apparel and Footwear in Morocco

November 2023

**Table of Contents** 

## Apparel and Footwear in Morocco

## EXECUTIVE SUMMARY

Apparel and footwear in 2023: The big picture 2023 key trends Competitive landscape Retailing developments What next for apparel and footwear?

## MARKET DATA

Table 1 - Sales of Apparel and Footwear by Category: Volume 2018-2023Table 2 - Sales of Apparel and Footwear by Category: Value 2018-2023Table 3 - Sales of Apparel and Footwear by Category: % Volume Growth 2018-2023Table 4 - Sales of Apparel and Footwear by Category: % Value Growth 2018-2023Table 5 - NBO Company Shares of Apparel and Footwear: % Value 2019-2023Table 6 - LBN Brand Shares of Apparel and Footwear: % Value 2020-2023Table 7 - Distribution of Apparel and Footwear by Format: % Value 2018-2023Table 8 - Distribution of Apparel and Footwear by Format and Category: % Value 2023Table 9 - Forecast Sales of Apparel and Footwear by Category: Volume 2023-2028Table 10 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028Table 11 - Forecast Sales of Apparel and Footwear by Category: % Volume Growth 2023-2028Table 12 - Forecast Sales of Apparel and Footwear by Category: % Value Growth 2023-2028

#### DISCLAIMER

SOURCES

Summary 1 - Research Sources

## Childrenswear in Morocco

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Decline in birth rates and economic fallout: Preference for budget-friendly baby clothing in open markets Rise in demand for casual/sports childrenswear due to Activity Enrolment:

## PROSPECTS AND OPPORTUNITIES

Anticipated growth in boys' and girls' apparel Rise in spending on children's sports and activity clothing Continued decline in baby and toddler wear; Preference for hypermarkets and independent stores

## CATEGORY DATA

Table 13 - Sales of Childrenswear by Category: Volume 2018-2023
Table 14 - Sales of Childrenswear by Category: Value 2018-2023
Table 15 - Sales of Childrenswear by Category: % Volume Growth 2018-2023
Table 16 - Sales of Childrenswear by Category: % Value Growth 2018-2023
Table 17 - NBO Company Shares of Childrenswear: % Value 2019-2023
Table 18 - LBN Brand Shares of Childrenswear by Category: Volume 2023-2028
Table 20 - Forecast Sales of Childrenswear by Category: Value 2023-2028
Table 21 - Forecast Sales of Childrenswear by Category: % Volume Growth 2023-2028
Table 22 - Forecast Sales of Childrenswear by Category: % Value Growth 2023-2028

## Apparel Accessories in Morocco

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Changes in apparel accessories post-pandemic Diverse growth patterns in apparel accessories Dominance and resilience of scarves in Moroccan fashion

## PROSPECTS AND OPPORTUNITIES

Economic caution and workforce dynamics shape purchasing habits Modest fashion's enduring influence and scarves' ongoing demand Climate impact on select accessories' performance

## CATEGORY DATA

Table 23 - Sales of Apparel Accessories by Category: Volume 2018-2023
Table 24 - Sales of Apparel Accessories by Category: Value 2018-2023
Table 25 - Sales of Apparel Accessories by Category: % Volume Growth 2018-2023
Table 26 - Sales of Apparel Accessories by Category: % Value Growth 2018-2023
Table 27 - NBO Company Shares of Apparel Accessories: % Value 2019-2023
Table 28 - LBN Brand Shares of Apparel Accessories by Category: Volume 2023-2028
Table 30 - Forecast Sales of Apparel Accessories by Category: Value 2023-2028
Table 31 - Forecast Sales of Apparel Accessories by Category: % Volume Growth 2023-2028
Table 32 - Forecast Sales of Apparel Accessories by Category: % Value Growth 2023-2028

#### Menswear in Morocco

**KEY DATA FINDINGS** 

## 2023 DEVELOPMENTS

Consumer shift towards budget-conscious choices and climate adaptation Local menswear differentiation and consumer preference Acquisition of Celio by Cap Retail

## PROSPECTS AND OPPORTUNITIES

Continued shift towards budget-friendly clothing and local sourcing Essential purchases drive men's clothing preferences Growing demand for tracksuits and active wear

## CATEGORY DATA

Table 33 - Sales of Menswear by Category: Volume 2018-2023 Table 34 - Sales of Menswear by Category: Value 2018-2023 Table 35 - Sales of Menswear by Category: % Volume Growth 2018-2023 Table 36 - Sales of Menswear by Category: % Value Growth 2018-2023 Table 37 - NBO Company Shares of Menswear: % Value 2019-2023 Table 38 - LBN Brand Shares of Menswear: % Value 2020-2023 Table 39 - NBO Company Shares of Men's Nightwear: % Value 2019-2023 Table 40 - LBN Brand Shares of Men's Nightwear: % Value 2020-2023 Table 41 - NBO Company Shares of Men's Outerwear: % Value 2019-2023 Table 42 - LBN Brand Shares of Men's Outerwear: % Value 2019-2023 Table 43 - NBO Company Shares of Men's Swimwear: % Value 2019-2023 Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2019-2023 Table 44 - LBN Brand Shares of Men's Swimwear: % Value 2020-2023 Table 45 - NBO Company Shares of Men's Underwear: % Value 2019-2023 Table 46 - LBN Brand Shares of Men's Underwear: % Value 2020-2023Table 47 - Forecast Sales of Menswear by Category: Volume 2023-2028Table 48 - Forecast Sales of Menswear by Category: Value 2023-2028Table 49 - Forecast Sales of Menswear by Category: % Volume Growth 2023-2028Table 50 - Forecast Sales of Menswear by Category: % Value Growth 2023-2028

## Womenswear in Morocco

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Rise of comfort-centric attire Price-driven purchases and retail dynamics Cultural revival of traditional attire

## PROSPECTS AND OPPORTUNITIES

Rise of price-conscious consumerism Strengthening local offerings and consumer engagement Evolving fashion trends and societal shifts

## CATEGORY DATA

Table 51 - Sales of Womenswear by Category: Volume 2018-2023 Table 52 - Sales of Womenswear by Category: Value 2018-2023 Table 53 - Sales of Womenswear by Category: % Volume Growth 2018-2023 Table 54 - Sales of Womenswear by Category: % Value Growth 2018-2023 Table 55 - NBO Company Shares of Womenswear: % Value 2019-2023 Table 56 - LBN Brand Shares of Womenswear: % Value 2020-2023 Table 57 - NBO Company Shares of Women's Nightwear: % Value 2019-2023 Table 58 - LBN Brand Shares of Women's Nightwear: % Value 2020-2023 Table 59 - NBO Company Shares of Women's Outerwear: % Value 2019-2023 Table 60 - LBN Brand Shares of Women's Outerwear: % Value 2020-2023 Table 61 - NBO Company Shares of Women's Swimwear: % Value 2019-2023 Table 62 - LBN Brand Shares of Women's Swimwear: % Value 2020-2023 Table 63 - NBO Company Shares of Women's Underwear: % Value 2019-2023 Table 64 - LBN Brand Shares of Women's Underwear: % Value 2020-2023 Table 65 - Forecast Sales of Womenswear by Category: Volume 2023-2028 Table 66 - Forecast Sales of Womenswear by Category: Value 2023-2028 Table 67 - Forecast Sales of Womenswear by Category: % Volume Growth 2023-2028 Table 68 - Forecast Sales of Womenswear by Category: % Value Growth 2023-2028

## Jeans in Morocco

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Shift to affordable yet quality jeans Rising demand for trendy jean styles Dominance and digital expansion of top-selling brands

## PROSPECTS AND OPPORTUNITIES

Expansion of client base and event-driven growth Consumer focus on pricing and promotions, boosted by e-commerce expansion Price disparity between international and local jeans brands

## CATEGORY DATA

Table 69 - Sales of Jeans by Category: Volume 2018-2023 Table 70 - Sales of Jeans by Category: Value 2018-2023 Table 71 - Sales of Jeans by Category: % Volume Growth 2018-2023 Table 72 - Sales of Jeans by Category: % Value Growth 2018-2023 Table 73 - Sales of Men's Jeans by Category: Volume 2018-2023 Table 74 - Sales of Men's Jeans by Category: Value 2018-2023 Table 75 - Sales of Men's Jeans by Category: % Volume Growth 2018-2023 Table 76 - Sales of Men's Jeans by Category: % Value Growth 2018-2023 Table 77 - Sales of Women's Jeans by Category: Volume 2018-2023 Table 78 - Sales of Women's Jeans by Category: Value 2018-2023 Table 79 - Sales of Women's Jeans by Category: % Volume Growth 2018-2023 Table 80 - Sales of Women's Jeans by Category: % Value Growth 2018-2023 Table 81 - NBO Company Shares of Jeans: % Value 2019-2023 Table 82 - LBN Brand Shares of Jeans: % Value 2020-2023 Table 83 - Forecast Sales of Jeans by Category: Volume 2023-2028 Table 84 - Forecast Sales of Jeans by Category: Value 2023-2028 Table 85 - Forecast Sales of Jeans by Category: % Volume Growth 2023-2028 Table 86 - Forecast Sales of Jeans by Category: % Value Growth 2023-2028 Table 87 - Forecast Sales of Men's Jeans by Category: Volume 2023-2028 Table 88 - Forecast Sales of Men's Jeans by Category: Value 2023-2028 Table 89 - Forecast Sales of Men's Jeans by Category: % Volume Growth 2023-2028 Table 90 - Forecast Sales of Men's Jeans by Category: % Value Growth 2023-2028 Table 91 - Forecast Sales of Women's Jeans by Category: Volume 2023-2028 Table 92 - Forecast Sales of Women's Jeans by Category: Value 2023-2028 Table 93 - Forecast Sales of Women's Jeans by Category: % Volume Growth 2023-2028 Table 94 - Forecast Sales of Women's Jeans by Category: % Value Growth 2023-2028

#### Hosiery in Morocco

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Economic constraints shape purchasing patterns Climate-driven shifts in hosiery preference Market dynamics and pricing strategies

#### PROSPECTS AND OPPORTUNITIES

Evolving consumer behaviour in a fragmented landscape Climate-induced shifts impact sales dynamics Dominance of non-sheer hosiery drive preferences

## CATEGORY DATA

Table 95 - Sales of Hosiery by Category: Volume 2018-2023 Table 96 - Sales of Hosiery by Category: Value 2018-2023 Table 97 - Sales of Hosiery by Category: % Volume Growth 2018-2023 Table 98 - Sales of Hosiery by Category: % Value Growth 2018-2023 Table 99 - NBO Company Shares of Hosiery: % Value 2019-2023 Table 100 - LBN Brand Shares of Hosiery: % Value 2020-2023 Table 101 - Forecast Sales of Hosiery by Category: Volume 2023-2028 Table 102 - Forecast Sales of Hosiery by Category: Value 2023-2028 Table 103 - Forecast Sales of Hosiery by Category: % Volume Growth 2023-2028 Table 104 - Forecast Sales of Hosiery by Category: % Value Growth 2023-2028

## Footwear in Morocco

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Active lifestyle influence on footwear sales Fashion-conscious choices drive footwear preference Changes in purchasing patterns and dominant players

## PROSPECTS AND OPPORTUNITIES

Evolution of casual footwear preferences Lifestyle shift towards active footwear Consumer caution and second-hand footwear growth

## CATEGORY DATA

Table 105 - Sales of Footwear by Category: Volume 2018-2023Table 106 - Sales of Footwear by Category: Value 2018-2023Table 107 - Sales of Footwear by Category: % Volume Growth 2018-2023Table 108 - Sales of Footwear by Category: % Value Growth 2018-2023Table 109 - NBO Company Shares of Footwear: % Value 2019-2023Table 110 - LBN Brand Shares of Footwear: % Value 2020-2023Table 111 - Distribution of Footwear by Category: Volume 2018-2023Table 112 - Forecast Sales of Footwear by Category: Volume 2023-2028Table 113 - Forecast Sales of Footwear by Category: Walue 2023-2028Table 114 - Forecast Sales of Footwear by Category: % Volume Growth 2023-2028Table 115 - Forecast Sales of Footwear by Category: % Value Growth 2023-2028

## Sportswear in Morocco

## **KEY DATA FINDINGS**

## 2023 DEVELOPMENTS

Sports achievements and endorsements drive sales surge Rise in demand linked to increased sports participation and fitness awareness Retailer's strategic expansion and customer-centric strategies

#### PROSPECTS AND OPPORTUNITIES

Continued growth fuelled by health awareness and government initiatives Preference for economical sportswear amid economic conditions Upsurge in sports activities set to boost demand for sportswear

#### CATEGORY DATA

- Table 116 Sales of Sportswear by Category: Value 2018-2023
- Table 117 Sales of Sportswear by Category: % Value Growth 2018-2023
- Table 118 NBO Company Shares of Sportswear: % Value 2019-2023
- Table 119 LBN Brand Shares of Sportswear: % Value 2020-2023
- Table 120 Distribution of Sportswear by Format: % Value 2018-2023
- Table 121 Forecast Sales of Sportswear by Category: Value 2023-2028
- Table 122 Forecast Sales of Sportswear by Category: % Value Growth 2023-2028

## About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/apparel-and-footwear-in-morocco/report.