



International  
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## Consumer Trends

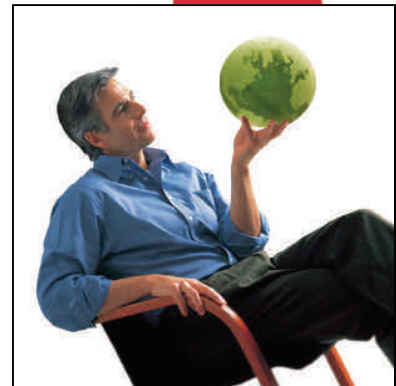
### Pet Food in Morocco



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Source: Shutterstock





▶ **EXECUTIVE SUMMARY**

The pet population in Morocco rose substantially between 2006 and 2011. This is partly attributable to increasingly Westernized lifestyles and a growing presence of European expatriates. As well, higher disposable incomes among Moroccans allow households to afford pets, pet food and other pet care expenses. In 2011, the number of dogs and cats rose to nearly 1.84 million and 479,000, respectively. The population of small mammals and reptiles kept as pets also increased.

Although small by Western standards, Morocco's pet food market is one of the largest in the Middle East and North Africa (MENA) region, second only to Israel, and continues to post rapid growth. According to Euromonitor, sales of pet food products rose by 10.6% between 2010 and 2011 to reach US\$40.9 million. Sales are projected to reach US\$50 million in 2013, and US\$64 million by 2016 as owners visit veterinarians more regularly.

Volume sales of dog and cat food are showing healthy growth, but specialty formats such as premium varieties and health and wellness products have grown less quickly, suggesting that they remain a niche preference. However, middle- and upper-income households that keep dogs and cats as companions represent an expanding group of pet owners. This will offer more opportunities for the pet food industry to target this consumer group with premium brands. Premium dry food is forecast to show the highest volume growth of all dog food from 2011 to 2015.

Non-food pet care products, such as shampoos and medicines, have also seen substantial sales growth in Morocco. However, sales remain limited to a small group of affluent consumers, generally those living in the larger cities. As a result, such products are usually only stocked by larger supermarket retailers or specialty stores.

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Source: Shutterstock

► **CONSUMER AND RETAIL TRENDS**

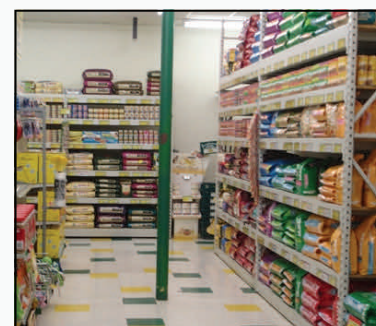


With rising disposable incomes and rapid rates of urbanization, Morocco is becoming an increasingly attractive consumer market for brands and retailers across virtually all categories, including pet food. Moroccan consumers' expenditure on pet food has increased significantly year-over-year.

In general, consumers in Morocco tend to prefer products in smaller packages, as they are perceived as more affordable; this preference also extends to pet food.

There are currently no private label pet food products in Morocco. Pet food is dominated by multinationals, with all products being imported. Also, many Moroccans continue to feed their pets unpackaged, unbranded food that is purchased in bulk. Industry players need to invest in raising consumer awareness of the benefits of feeding packaged, prepared food to their pets.

The main distribution channels for pet food continued to be supermarkets/hypermarkets in 2011, which carry a large selection of products. Supermarkets and hypermarkets frequently run in-store promotions for pet food to stimulate sales, a practice that is non-existent in veterinary clinics (which also sell pet foods).



Source: Planet Retail

Sales through pet shops, veterinary clinics and other non-grocery retailers remained limited, as these outlets tend to be scattered around the country and remain accessible only to urban dwellers. A continued interest in specialized pet shops could increase the performance of prepared pet food, as consumers seek "expert advice" from such retailers, and are encouraged to purchase these products.

**Moroccan Pet Population in Thousands of Animals**

	2006	2007	2008	2009	2010	2011	% Growth 2006/2011
Total Pets	2,501	2,605	2,655	2,712	2,760	2,804	10.4%
Dogs	1,699	1,755	1,774	1,800	1,821	1,841	7.2%
Cats	418	440	452	464	473	479	13.2%
Birds	150	160	170	180	189	197	26%
Fish	124	130	135	140	145	151	16.9%
Small mammals	62	68	71	74	77	80	24.2%
Reptiles	48	52	53	54	55	56	14.6%

Source: Euromonitor 2012



**Moroccan Pet Food Market Sizes by Category, Retail Sales in \$US Millions**

Category	2006	2007	2008	2009	2010	2011
Total Pet Care	29.1	31.7	34.2	37.0	40.5	44.7
Pet Food	26.7	29.1	31.3	33.7	37.0	40.9
Pet Products	2.3	2.6	2.9	3.2	3.5	3.8

**Moroccan Pet Food Market Sizes by Category, Forecast Retail Sales in \$US Millions**

Category	2012	2013	2014	2015	2016
Total Pet Care	49.1	53.8	58.9	64.1	69.8
Pet Food	45.0	49.4	54.1	59.1	64.4
Pet Products	4.1	4.4	4.8	5.1	5.4

The emergence of a broader lower-middle-class is driving sales of economy pet food, and with it, sales of overall pet care products in Morocco (and many other Arab and African countries as well). The proportion of Moroccan households with an annual disposable income of more than US\$10,000 increased by 34% in 2010 to represent 36% of total households, and is now the largest proportion of all income categories (Euromonitor, 2011).

**Most Active Pet Food Markets in the Middle East and North Africa (MENA) Region  
Based on Retail Sales in \$US Millions**

Geography	2006	2007	2008	2009	2010	2011
Middle East and Africa	564.2	601.3	636.1	679.8	736.2	796.6
Israel	94.7	102.9	108.3	113.9	121.1	128.5
Morocco	26.7	29.1	31.3	33.7	37.0	40.9
Saudi Arabia	12.7	13.8	16.4	19.1	21.7	24.7
Egypt	1.7	1.8	2.0	2.3	2.5	2.7

**Most Active Pet Food Markets in the Middle East and North Africa (MENA) Region  
Forecast Retail Sales in \$US Millions**

Geography	2012	2013	2014	2015	2016
Middle East and Africa	856.5	918.9	984.0	1,052.3	1,134.2
Israel	136.7	146.1	156.4	167.8	180.7
Morocco	45.0	49.4	54.1	59.1	64.4
Saudi Arabia	28.1	31.8	36.2	41.3	47.0
Egypt	3.0	3.3	3.6	4.0	4.5

Source for all: Euromonitor 2012

▶ **DOG FOOD**



Moroccan dog owners are slowly making the transition away from non-prepared food, alongside rising awareness among middle-income consumers regarding the affordability and health benefits of prepared dog food. This, coupled with a rising dog population, makes prepared dog food products a category of growing interest. In particular, premium food is on the rise, although the main purchasers remain high-income groups, or Western expatriates residing in the country.

Dog food is the leading category in the pet food market in Morocco (representing 96% of the total pet food sector), with a strong growth of 9.4% in 2011. Dry dog food is the leading sub-category with sales forecast to reach US\$28.3 million by 2015

A healthy compound annual growth rate (CAGR) of 9% is predicted for dog food value sales over the next five years, with the category expected to record sales of US\$35.3 million in 2015.



Source: Shutterstock

**Moroccan Dog Food Market Sizes by Type**  
Retail Sales – Historic/Forecast – in \$US Millions

Category	2006	2007	2008	2009	2010	2011	2012	2015
Total Dog Food	16.4	17.9	19.3	21.0	23.5	25.7	27.9	35.3
Dry Dog Food	12.0	13.2	14.5	15.9	17.9	19.8	21.8	28.3
Wet Dog Food	4.4	4.6	4.8	5.0	5.5	5.8	6.0	6.9
Dog Treats and Mixers	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1

Source: Euromonitor, 2012

**Moroccan Dog Food Market Sizes by Type**  
Retail Volume Sales – Historic/Forecast – in Tonnes

Category	2006	2007	2008	2009	2010	2011	2012	2015
Total Dog Food	5,272.5	5,715.3	6,210.4	6,791.1	7,367.1	7,948.4	8,550.1	10,447.7
Dry Dog Food	3,601.0	3,926.0	4,309.1	4,762.2	5,224.9	5,698.2	6,193.2	7,800.0
Wet Dog Food	1,667.5	1,764.7	1,873.9	1,999.0	2,110.6	2,216.8	2,321.8	2,607.6
Dog Treats and Mixers	4.0	24.6	27.4	29.9	31.6	33.3	35.1	40.1

Source: Euromonitor, 2012

▶ **DOG FOOD (continued)**



There are no domestic producers of pet food currently operating in Morocco. As such, the Moroccan company Animal Comfort International, which imports pet care and pet food products, is looking to open a manufacturing facility in Morocco to manufacture dog food (Euromonitor).

Locally produced brands will have an immense impact on the sector, as they will undoubtedly retail at a lower price compared to international brands. This may, in turn, encourage more people to buy local products.

**Top 10 Dog Food Brand Shares in Morocco, Based on % Retail Sales Value**

Brand	Company	2006	2007	2008	2009
Pedigree	Waltham Petfoods Plc	32.9	33.6	34.4	35.2
Royal Canin	Jessy Diffusion SA	6.6	6.8	7.1	7.2
Royal Chien	Jessy Diffusion SA	6.1	6.3	6.5	6.8
Dick	Conserverie Morbihannaise	2.7	2.6	2.5	6.4
Canigou	Waltham Petfoods Plc	8.1	6.7	6.4	6.1
Chappi	Mars Morocco	-	5.2	5.3	5.1
Friskies	Nestlé Maroc SA	2.8	2.9	3.4	3.6
Las Dog	Madico PM Casablanca	1.5	1.5	1.4	2.5
Wooffy	Doane Pet Care Enterprises Inc	2.1	1.9	1.8	1.7
Blacky	Ipes Ibérica SA	1.2	1.3	1.3	1.5

Source: Euromonitor, 2012

Note: 2009 is the most recent data available for brand share information

**Moroccan Dog Food by Price Band, 2009**

Sector	Price Range	Price Point
Wet Dog Food	Premium	US\$2.67 and above
	Mid-priced	US\$2.22 – US\$2.66
	Economy	Below US\$2.22
Dry Dog Food	Premium	US\$2.78 and above
	Mid-priced	US\$2.00 – US\$2.77
	Economy	Below US\$2.00

Source: Euromonitor, 2012



Source: Mintel



► **CAT FOOD**



An increase in the cat population, coupled with the rising number of people switching to prepared food, is driving growth of cat food sales.



Source: Shutterstock

A shift in the perception of pets among Moroccans and rising disposable incomes are the main drivers of a growing cat population. As with dogs, this is compounded by the rising number of expatriates settling in the country, and the increasing number of Moroccans returning from the West. In addition, shifting demographics resulting in more single-person households and young professionals living alone in the major cities are also likely to expand the cat population, and in turn, sales of prepared cat food.

More and more Moroccan consumers are shifting towards prepared cat food and away from non-prepared meals. The rising importance of modern retailers, including supermarkets/hypermarkets where cat food is primarily sold, may also drive sales growth.

**Moroccan Cat Food Market Sizes by Type**  
Retail Sales – Historic/Forecast – in \$US Millions

Category	2006	2007	2008	2009	2010	2011	2012	2015
Total Cat Food	8.7	9.4	10.1	10.7	11.4	12.1	12.8	14.9
Wet Cat Food	6.7	7.2	7.8	8.2	8.8	9.3	9.8	11.4
Dry Cat Food	2.0	2.2	2.3	2.5	2.7	2.8	3.0	3.6

Source: Euromonitor, 2012

**Moroccan Cat Food Market Sizes by Type**  
Retail Volume Sales– Historic/Forecast – in Tonnes

Category	2006	2007	2008	2009	2010	2011	2012	2015
Total Cat Food	2,858.4	3,090.5	3,318.6	3,549.8	3,758.7	3,967.1	4,178.0	4,812.6
Wet Cat Food	2,364.0	2,560.1	2,751.9	2,944.2	3,119.0	3,291.5	3,465.7	3,988.5
Dry Cat Food	494.4	530.4	566.7	605.5	639.8	675.6	712.3	824.1

Source: Euromonitor, 2012

**Moroccan Cat Food by Price Band, 2009**

Sector	Price Range	Price Point
Wet Dog Food	Premium	US\$3.33 and above
	Mid-priced	US\$2.89 – US\$3.32
	Economy	Below US\$2.89
Dry Dog Food	Premium	US\$3.33 and above
	Mid-priced	US\$2.78 – US\$3.33
	Economy	Below US\$2.78

Source: Euromonitor, 2012





## ▶ CAT FOOD (continued)

**Top 10 Cat Food Brand Shares in Morocco,  
Based on % Retail Sales Value**

Brands	Company	2006	2007	2008	2009
Whiskas	Mars Morocco	-	24.4	24	23.1
Kitekat	Mars Morocco	-	18.9	19.3	19.9
Las Cat	Madico PM Casablanca	3.7	3.8	3.9	11.9
Poilux	Conserverie Morbihannaise	3.3	3.4	3.7	9.5
Friskies	Nestlé France SA	9.2	9	8.7	8.6
Minou	Cecab, Groupe	5.3	5.4	5.4	5.5
Chat Mature	Jessy Diffusion SA	4.4	4.4	4.3	4.3
Festi	Continentrale Nutrition SA	2.9	3	3.2	3.8
Blacky	Ipes Ibérica SA	1.1	1	1	2.7
Matou	Groupe Covi	1.4	1.3	1.1	1

*Source: Euromonitor, 2012*

*Note: 2009 is the most recent data available for brand share information*

## ▶ OTHER PET FOOD

Bird food remains the largest sub-segment of this category, with birds (particularly canaries, parrots and pigeons) being the most prevalent pet type in Morocco after dogs and cats. The keeping of fish as pets is a more recent trend that has slowly begun to make way in Moroccan culture due to Western influence.

Small mammal and reptile food sales remain negligible in Morocco, yet reptiles and small mammals as pets do exist, especially turtles. These are, however, normally fed unprepared food, or left to feed themselves.

**Moroccan Other Pet Food Market Sizes by Type  
Retail Sales – Historic/Forecast – in \$US Thousands**

Category	2006	2007	2008	2009	2010	2011	2012	2015
Total Other Pet Food	443	458	472	488	509	532	558	659
Bird Food	337	348	358	371	387	407	429	514
Fish Food	106	110	114	118	121	125	129	145

*Source: Euromonitor, 2012*



▶ OTHER PET FOOD (continued)



Other Pet Food Brand Shares in Morocco,  
Based on % Retail Sales Value

Brands	Company	2006	2007	2008	2009
Kiki Excellent	Gonzalo Zaragoza Manresa, SL	48.6	53.4	55.3	56
Vinci	Levantex Importation et Exportation	-	18	20.4	23
Petbon	Nestlé Maroc SA	32.8	10	9	7
Others	Others	18.6	18.6	15.4	14
Total	Total	100.0	100.0	100.0	100.0

Source: Euromonitor, 2012

Note: 2009 is the most recent data available for brand share information



The Government of Canada has prepared this report based on primary and secondary sources of information. Although every effort has been made to ensure that the information is accurate, Agriculture and Agri-Food Canada assumes no liability for any actions taken based on the information contained herein.

**Consumer Trends: Pet Food in Morocco**

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